Freshwater aquaculture in the EU: current situation and potentialities for growth

Webinar: FRESHWATER AQUACULTURE: Nature-based solutions

Safa SOUIDI, AND-INTERNATIONAL

www.eumofa.eu
Purpose of EUMOFA and history

In line with new Common Market Organisation (CMO), EUMOFA is part of the overall market-oriented approach of the management of fisheries and aquaculture activities.

**Feasibility phase**
- 2009

**Release of the pilot project**
- 2013

**2014**

EUMOFA

**Release and enhancement of a fully-fledged observatory**
- 2015
- 2021

**Market transparency:** Free access to a single database in a single website, in all the 24 EU languages

**Harmonisation of data throughout the value chain in the EU**

**User-friendly queries, maps and dashboards**

**Profiles by main country and species**

**Regular and ad-hoc studies**
Context, objectives and methodology of the study

❖ **Context:**

  - decrease of freshwater production in the EU, increasing gap between supply and demand.
  - 11 Member States asking for strengthening the support to freshwater aquaculture after 2020.

❖ **Objectives:** Assess the current status of freshwater aquaculture (socio-economic and market perspectives, innovation, etc.) and its growth potential in the EU.

❖ **Methodology:** Desk research and stakeholders consultation: national authorities survey and interviews with the main professional organisations.
• **275,000 tonnes** produced in 2018 for circa EUR 910 million representing only 3% of the EU supply of Fisheries and Aquaculture Products (in volume).

• The **largest producers** in 2018: France (14% of EU production in volume), Poland (13%), Italy (13%), Denmark (9%), Czechia (8%).

• **EU production focused mainly on two species:** Rainbow trout (60% of production volume and 62% of its value) and **Common carp** (23% of production volume and 18% of its value). Other species: other carp species, catfish species, European eel, sturgeons, etc.

• **Diversity of production systems:** extensive production (fish ponds), intensive production in tanks and raceways, intensive production in recirculating systems (RAS), other intensive innovative and sustainable systems.
Trout production & market

- The leading freshwater farmed species in the EU (60% of production volume and 62% of its value).
- EU was the 2nd producer of Rainbow trout in the world (after Iran) in 2018. Decrease of EU production during the last decade (15%), while the other producers (Iran, Turkey) have increased their production.
- Trout market: (1) moderate demand in most markets, (2) competition with other farmed species (salmon), and (3) competition with trout from Turkey.
Carp production & market

- 23% of EU freshwater production volume and 18% of production value.
- Main EU producers: Central and Eastern EU Member States: Czechia, Poland, Hungary.
- Overall decrease of carp production during the last decade: Western EU MS versus Central and Eastern EU MS.
- Linked to extensive farming: fish ponds (cyprinids represent 80% of fishponds production) → Environmental benefits (e.g. water management, biodiversity, landscape management, cultural value, etc.).
- **Carp market is traditional, well established** with some signs of dynamism.
Areas of innovation:

- Development of environmentally sustainable fish production (Integrated Multitrophic Aquaculture, aquaponics, RAS, etc.)
- Development and promotion of pond aquaculture production (intensification: Combined Intensive-Extensive, multifunctional pond farming)
- Development of the production of new species (Diversity: pike-perch in RAS)
- Prevention and treatment of fish diseases (ParaFishControl)
- New, efficient fish feeds based on novel ingredients (ARRIANA, pland-based diet)
- Adding value to freshwater aquaculture products (organic certification, ecolabels, etc.)
EU support of aquaculture

European Green Deal
European commission’s strategy to implement the United Nation’s 2030 Agenda
Healthier and more sustainable EU food system

Farm to Fork strategy
Fair, healthy and environmentally-friendly food system

Sustainable food production
Sustainable food Consumption
Sustainable food Processing and distribution
Food loss & waste prevention

The 2013 strategic guidelines
Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 to 2030

Building resilience and competitiveness
Ensuring the participation of EU aquaculture in green transition
Fostering social acceptance and improved consumer information of EU aquaculture activities and products
Increasing knowledge and innovation

EU MS have reviewed their national strategic plans
Growth drivers and barriers

**Drivers**

- **Governance**: EU strategic guidelines for the development of sustainable aquaculture in the EU, support from the new EMFAF.
- **Innovation**: environmentally sustainable fish production, success stories in the field of innovative production systems.
- **Processing/marketing**: identified initiatives to supply semi-prepared products and prepared products.
- **Consumption**: increasing demand for labelled products, some valuable niche markets with stable demand in the international markets.

**Barriers**

- **Knowledge of the sector**: low coverage of data collection systems of the freshwater aquaculture sector (Data Collection Framework).
- **Governance**: environmental regulations (costs and barrier to innovation and intensification), administrative burdens.
- **Innovation**: high initial and operating costs in relation to innovation (particularly for SMEs), lack of exchange of best practices, diversity of national regulations.
- **Processing/marketing**: high investment needs, lack of marketing knowledge.
- **Consumption**: traditional way of consuming carp (Christmas and Easter), low national consumption of freshwater fish.
Potentialities for growth:

• **Freshwater pond production** will be stable or increasing depending on a combination of: (1) Market demand; (2) Innovation strategies; (3) Recognition of ecosystem services.

• **Intensive flow-through system** will probably decrease in volume but increase in value, depending on the combination of: (1) market demand; (2) water access for new sites; (3) market segmentation.

• **Freshwater recirculation systems** will increase, notably for high-value production and potentially for more resistant species/warm water species.

• **Freshwater production of new species** which are not currently produced locally and for which there is market demand will increase.
1. The scope of the Data Collection Framework should be extended to ensure accurate monitoring of freshwater aquaculture production.

2. Further support of research and innovation: technical aspects of production (new techniques, new species, etc.) and marketing strategies (promotional campaigns, supply of local/regional/national/international markets).

3. Allocate more resources to support the exchange of good practices developed within the EU and elsewhere.

4. Continue to support the freshwater aquaculture industry through EU funding instruments.

5. Recognise the benefits of fishpond aquaculture farms should go through further assessment and quantification of the services that it provides to environment and communities.

6. Further promote the consumption of freshwater aquaculture products throughout Europe (communication, market studies, etc.).

7. Encourage MS to establish incentives to adopt innovative sustainable solutions.
SUBSCRIBE TO THE EUMOFA NEWSLETTER
http://www.eumofa.eu/mailing-list

www.eumofa.eu
contact-us@eumofa.eu
@EU_MARE #EUMOFA