



EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products



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

Webinar: FRESHWATER AQUACULTURE: Nature-based solutions

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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.

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

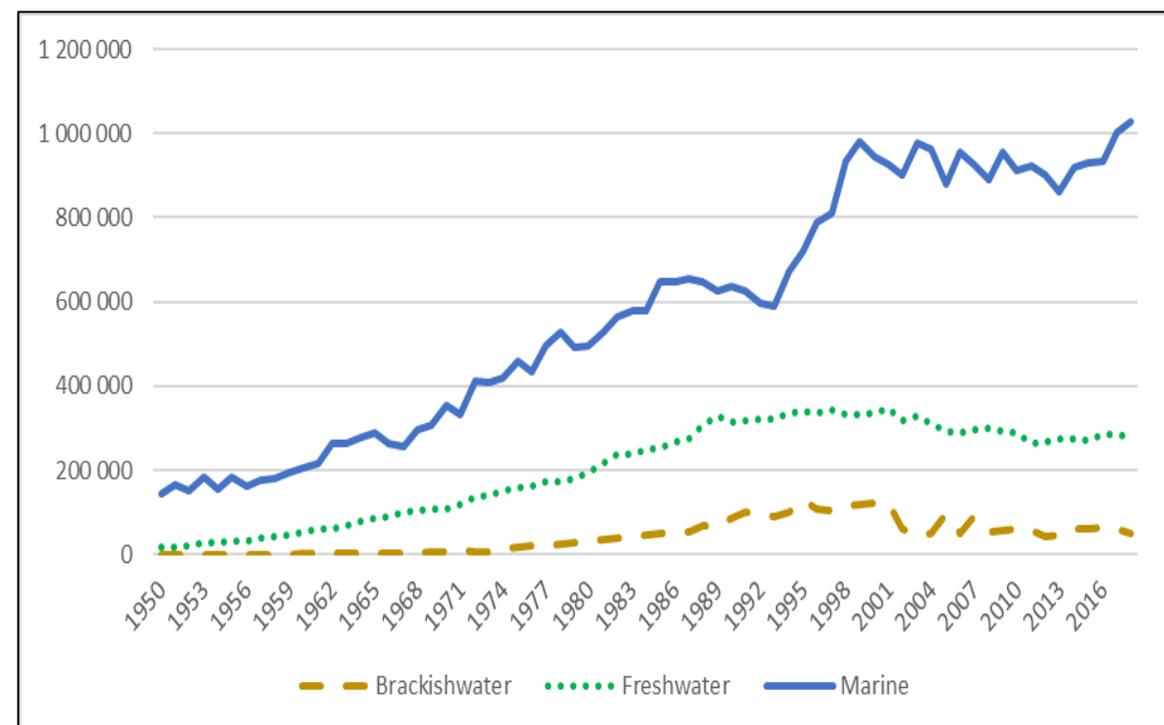
Regular and ad-hoc studies

❖ Context:

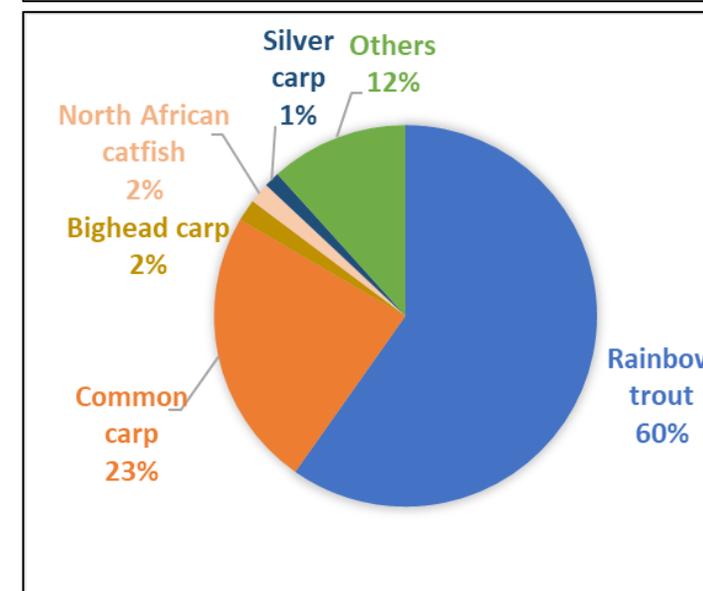
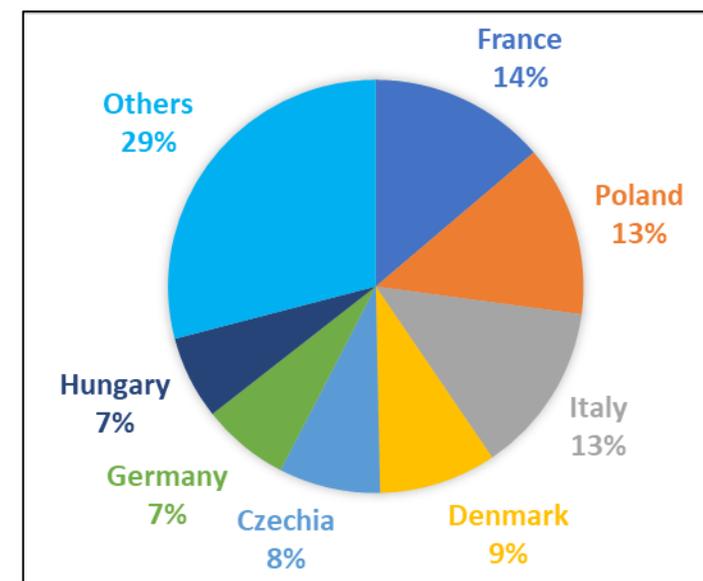
- decrease of freshwater production in the EU, increasing gap between supply and demand.
- 11 Member States asking for strengthening the support to freshwater aquaculture after 2020.

- ## ❖ 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.



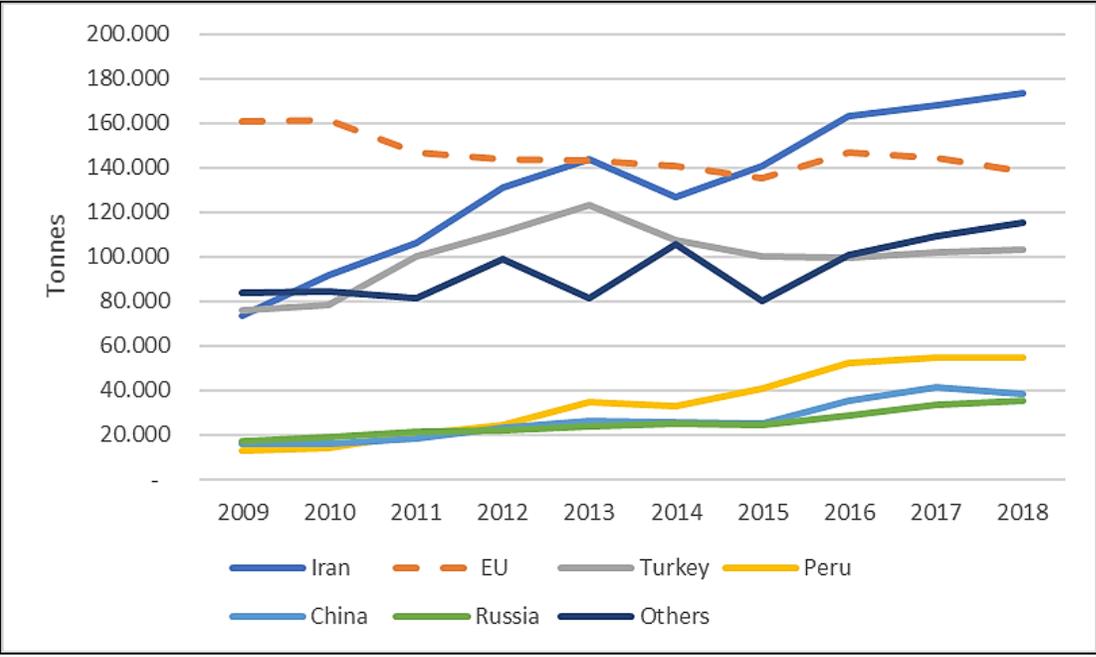
- **275.000 tonnes** produced in 2018 for circa EUR 910 million representing only 3% of the EU supply of Fisheries and Aquaculture Products (in volume).
- The **largest producers** in 2018: France (14% of EU production in volume), Poland (13%), Italy (13%), Denmark (9%), Czechia (8%).
- **EU production 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.



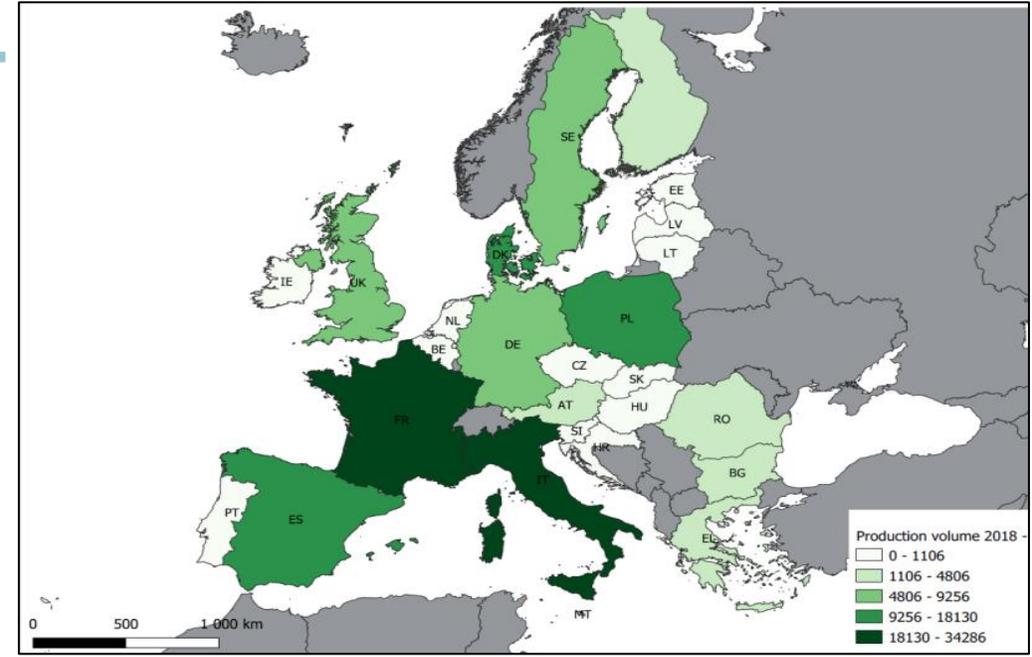
Trout production & market



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European Commission

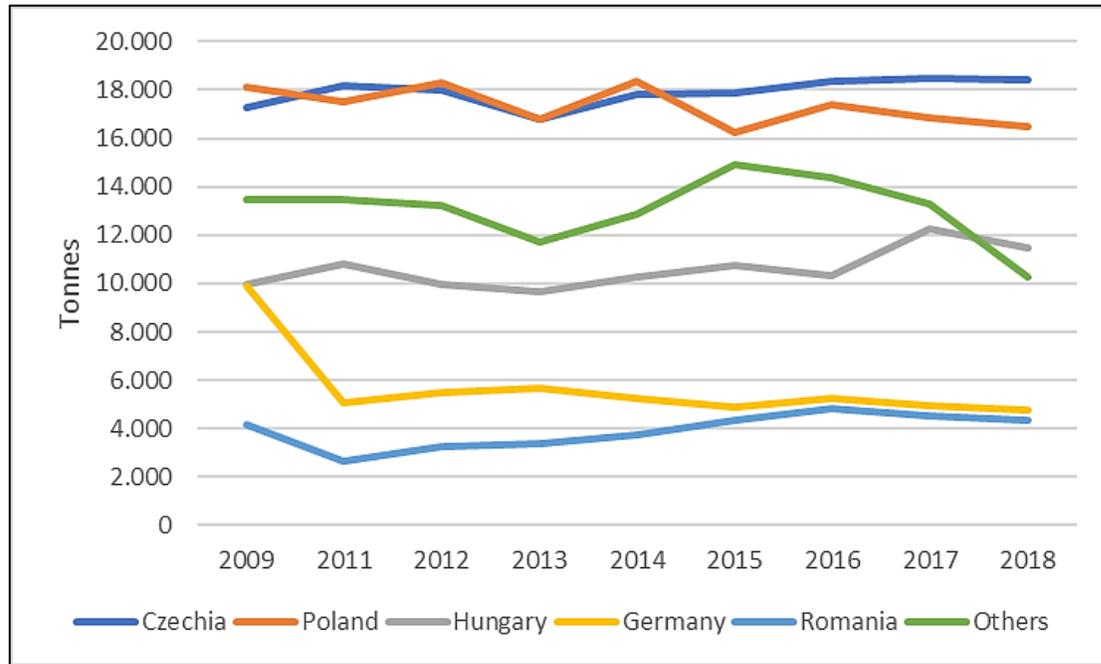


- The leading freshwater farmed species in the EU (60% of production volume and 62% of its value).
- EU was the 2nd producer of Rainbow trout in the world (after Iran) in 2018. Decrease of EU production during the last decade (15%), while the other producers (Iran, Turkey) have increased their production.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

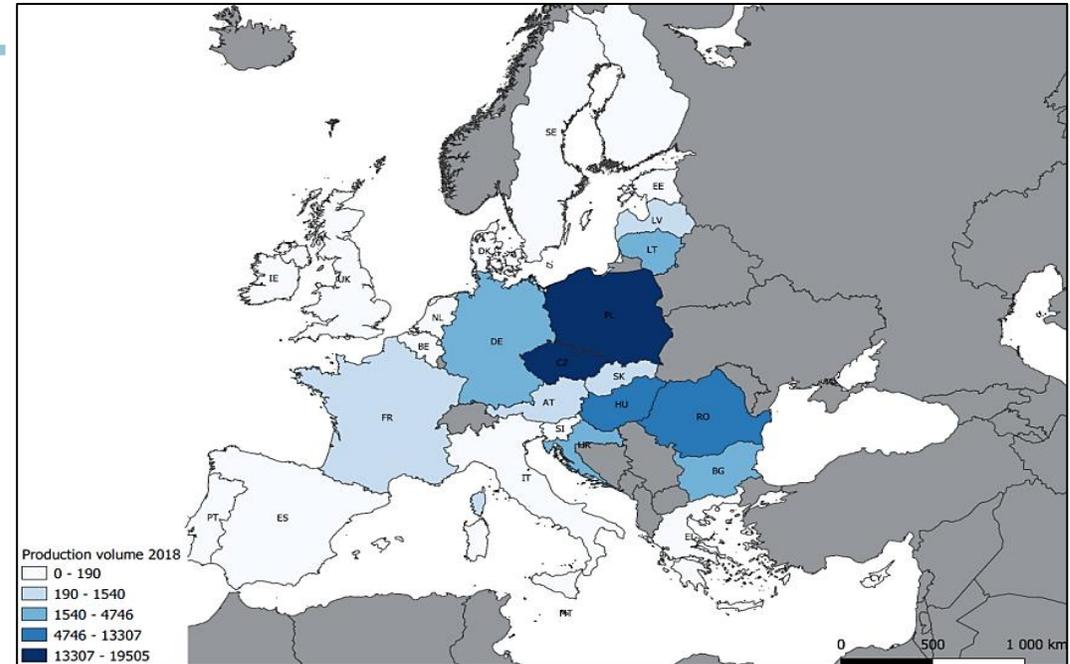
Carp production & market



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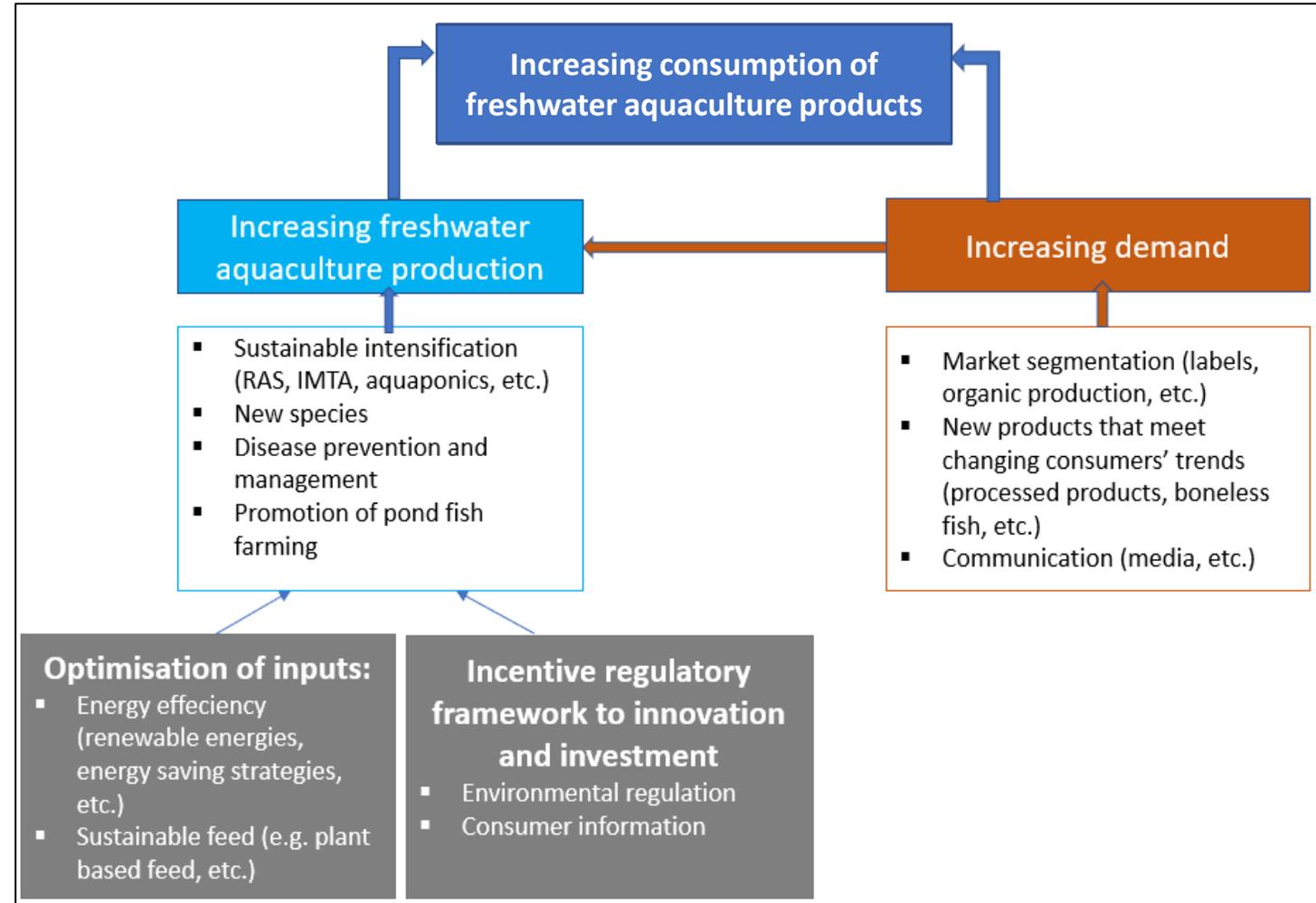
European Commission



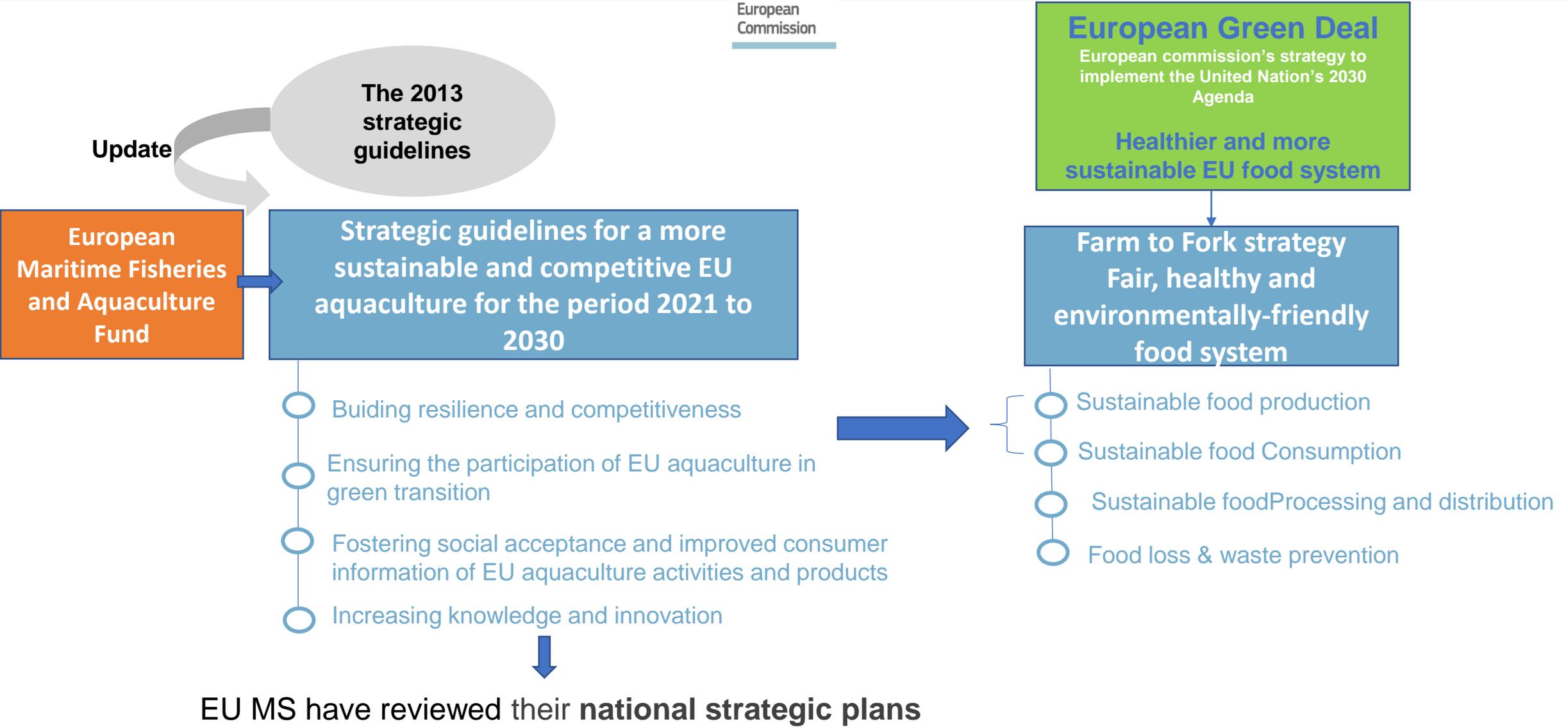
- 23% of EU freshwater production volume and 18% of production value.
- Main EU producers: Central and Eastern EU Member States: Czechia, Poland, Hungary.
- Overall decrease of carp production during the last decade: Western EU MS versus Central and Eastern EU MS.
- Linked to extensive farming: fish 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** ([Diversify](#): pike-perch in RAS)
- **Prevention and treatment of fish diseases** ([ParaFishControl](#))
- **New, efficient fish feeds based on novel ingredients** ([ARRIANA](#), plant-based diet)
- **Adding value to freshwater aquaculture products** (organic certification, ecolabels, etc.)



EU support of aquaculture



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.

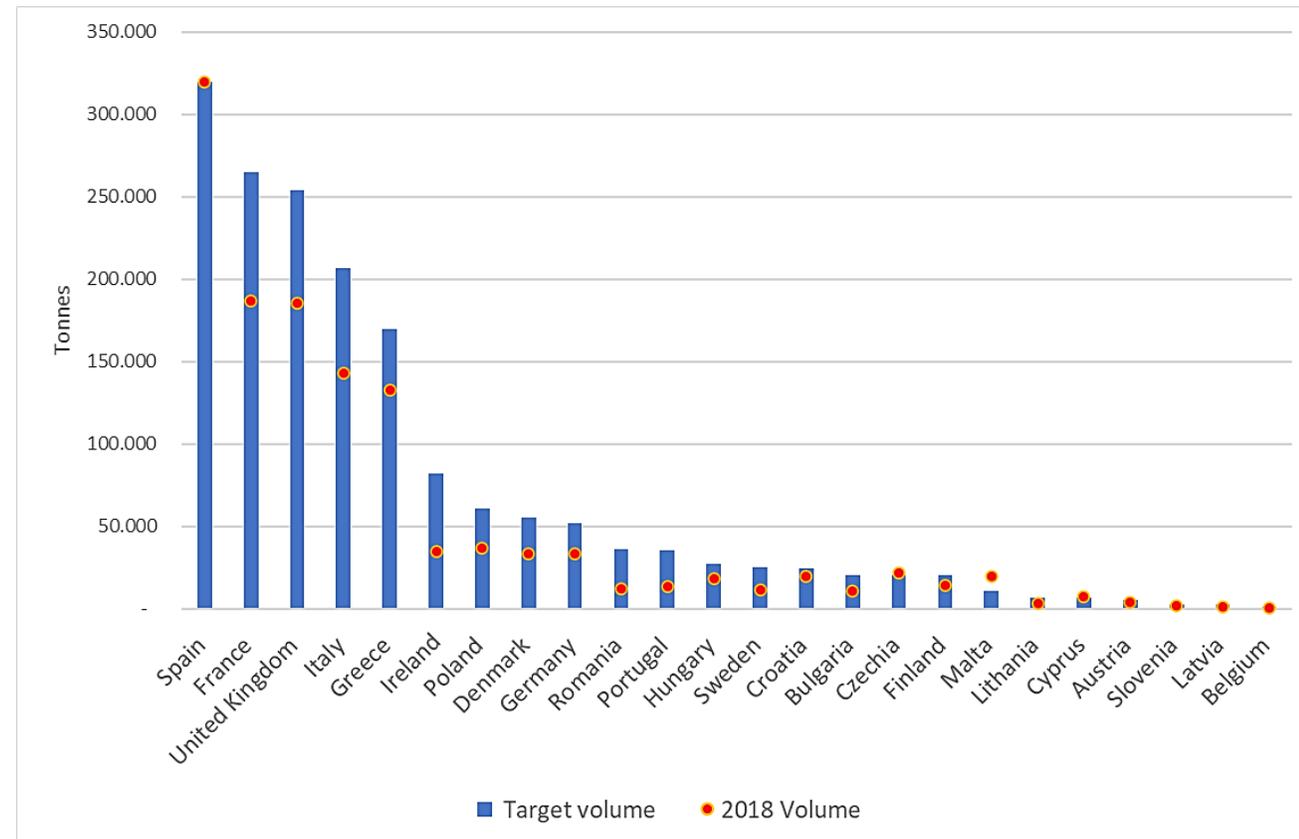
Barriers

- **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**.

Achievements of the EU target on aquaculture production (production data of 2018)



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**.



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