

ECA: Navigating the challenges of EU aquaculture towards strategic sustainability

Aquaculture and strategic autonomy

More than a quarter of seafood eaten in the EU is farmed, yet only around a third of it comes from the EU. In 2020, the EU's total aquaculture production amounted to 1.1 million tonnes, accounting for less than 1 % of the global total. While aquaculture is one of the world's fastest growing food sectors, EU production volumes stagnated over the 2014-2020 period despite the fact, that the funds allocated to aquaculture for the 2014-2020 period exceeded three times the amount spent in the previous period.

Aquaculture promises to satisfy the demand for protein-rich food with a lower carbon footprint, while alleviating pressure on depleted wild fish stocks, but this promise depends on several factors.

A challenging audit: navigating a complex policy and a diverse sector

Auditing EU aquaculture policy is challenging. The growth, competitiveness and sustainability of the sector is linked to several policy areas: environmental policies, permitting procedures, maritime spatial planning, food safety/labelling, trade and research. Covering all aspects in one report is impossible, so some areas were excluded from the audit scope, such as trade and research policies.

The EU aquaculture sector is very diverse, as member states specialise in different types and species of aquaculture production. The audit covered Greece, Spain, France, Italy, Poland and Romania. They account for around 71 % of the EU's 2020 aquaculture production by volume and represent a good balance of both marine and freshwater aquaculture, as well as finfish and shellfish farming.

Bottlenecks to aquaculture growth in the EU

The audited member states made little progress towards their aquaculture production targets for 2020. In France and Italy production in 2020 was even lower than in 2013. Member states often reallocated financial resources to those measures attracting greater interest from the aquaculture sector. Projects aimed at maintaining existing production capacity were far more prevalent than those focused on expanding production.

Access to water remained a significant challenge with unresolved conflicts and environmental concerns complicating spatial planning and licensing procedures. Improving spatial planning was one of the needs recognised in our previous audit, and we observed progress in member states. However, several member states faced delays in approving their plans, and even when available, conflicts frequently resurfaced during the licensing phase. These conflicts often involved other productive sectors

Sustainability: How green is aquaculture really?

We do not know how green aquaculture really is, as very little official data is available to assess the environmental performance of EU aquaculture. Standardised indicators for key metrics such as nutrient discharge, number of escapes, and feed demand – particularly the reliance on fishmeal and fish oil – would provide valuable insights into the environmental impact of aquaculture.

Hooked on the future: what lies ahead?

There is uncertainty about the application of environmental rules, sometimes coupled with insufficient knowledge of the carrying capacity of a specific environment. The rules need clarification, and the Commission is working on a guidance document on the implementation of applicable EU environmental legislation, including the result of its efforts to map good practices at government and industry level on different aspects of the environmental performance of aquaculture.

Studies aimed at gaining a deeper understanding of the carrying capacity of areas designated for aquaculture development could streamline licensing procedures. By determining the optimal number and size of sites that can be sustained within these areas, authorities can expedite the licensing process and facilitate the growth of the aquaculture sector.

Applied research into farming practices and sustainable feeding methods is crucial. For example, locating marine fish farms further from the coast could alleviate environmental pressures and reduce potential conflicts with other sectors.

Improving the sustainability of feed systems and limiting the reliance on fishmeal and fish oil is essential to reduce the environmental footprint of aquaculture. Serious efforts are needed to diversify aquaculture production methods, developing multi trophic approaches and expanding the production of non-fed and low trophic species, such as shellfish, seaweed and small pelagic fish.

And finally, the availability of accurate and transparent data on the sustainability of EU aquaculture is paramount to address consumer concerns, ensure informed decision-making, and foster the adoption of sustainable practices across the industry.

In conclusion, the realisation of EU aquaculture's promise to deliver low-carbon proteins, conserve wild fish stocks, and enhance food security hinges on effectively addressing these challenges and leveraging the substantial EU funds allocated for this purpose.