



EU Aquaculture Policy

Where are we and where are we heading?

Courtney Hough
General Secretary

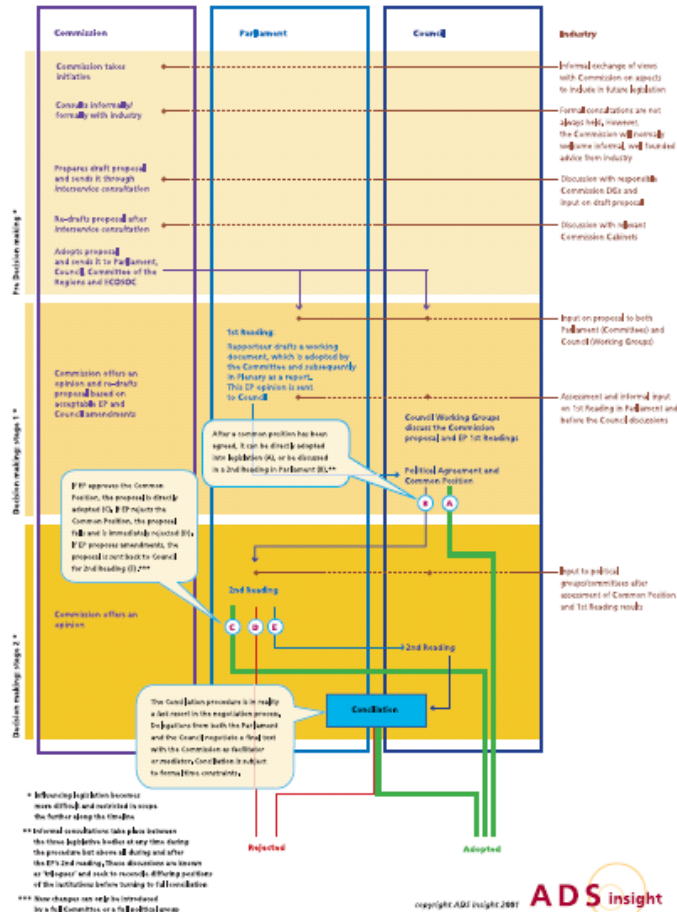


Brussels – What is it exactly?

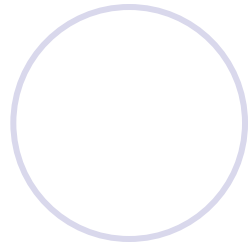


- European Council
- European Commission
- European Parliament
- Committee of Regions
- Economic & Social Committee
- Committee of Permanent Representatives....

Co-decision procedure...

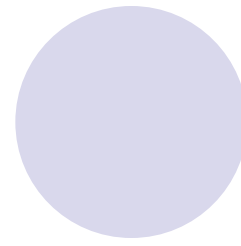
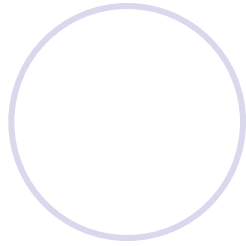


'A camel is a racehorse designed by a Committee'



European Policy

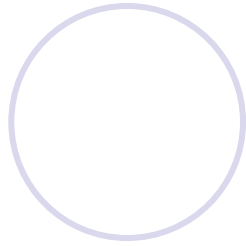
- A bit of history...
- The Common Fisheries Policy (1970)
 - designed to make EU fishing grounds a common resource by giving access to all Member States (6 at that time)
 - to provide a common market in fish
- It is the latter consideration that brought aquaculture into the CFP



Before 2002



- Marine aquaculture was seen as a potential alternative to fisheries
 - Shellfish
 - Marine fish
 - Could this provide employment in fisheries areas?
- Objective 1 areas – EU rural/coastal areas needing economic development
 - Benefited from funding for developing aquaculture
 - Conundrum developed between freshwater and marine fish farming (CAP or CFP?)



Policy developments

- Declining fish stocks & overfishing became major concerns for EU fisheries management
- TACs/Quotas & control dominated
- Multiple Regulations and Directives for fisheries control

BUT

- Aquaculture was on the sidelines
 - Low production importance, different markets, weak/no representation...
 - Ever-increasing legislation influencing aquaculture



Policy based on knowledge & consultation

- In the 1990s, the Consultative Committee on Fisheries had a sub-Committee on aquaculture
 - Basically, one-way traffic
- EU aquaculture was in a vacuum – domination of discussion by fisheries and agricultural concerns –
 - no obvious 'port of call' for issues affecting the sector

BUT

- Aquaculture production was increasing quickly
 - Salmon, trout, seabass, seabream becoming important & visible market components (EurAq =17% volume/27% value)
 - Focused on high value products – seen as a valuable opportunity

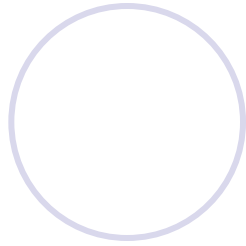


Reform of EU consultation

- In 1999, official fisheries consultation was expanded to include representative interests of:
 - aquaculture
 - fish farming
 - shellfish culture
 - processing
 - consumer interests
 - NGO representatives (environment/development)

Within a reformed

Advisory Committee on Fisheries and Aquaculture (ACFA)



Important events

- **Consumer health protection**
 - HACCP and traceability
 - Dioxin & PCB crisis
- **Attention to animal health & welfare**
 - Disease control measures
- **Environmental issues**
 - Application of Water Framework Directive, Habitats, Biodiversity, Natura 2000....
 - Reducing waste effluent
 - Escapes & GMOs
 - EIAs, IPPC, EMAS, ICZM....('Eurospeak' acronyms)



The Reform of the CFP (2002)

- Green Paper consultation on the CFP (2001) allowed sector to request a CAqP
 - Stimulated the achievement of the first Strategy on European aquaculture (COM (2002) 511 final)
- Main objectives of Strategy
 - Create long-term secure employment
 - Assure provision of healthy, safe, high quality consumer products
 - Promote high animal health & welfare standards
 - Ensure an environmentally-sound industry



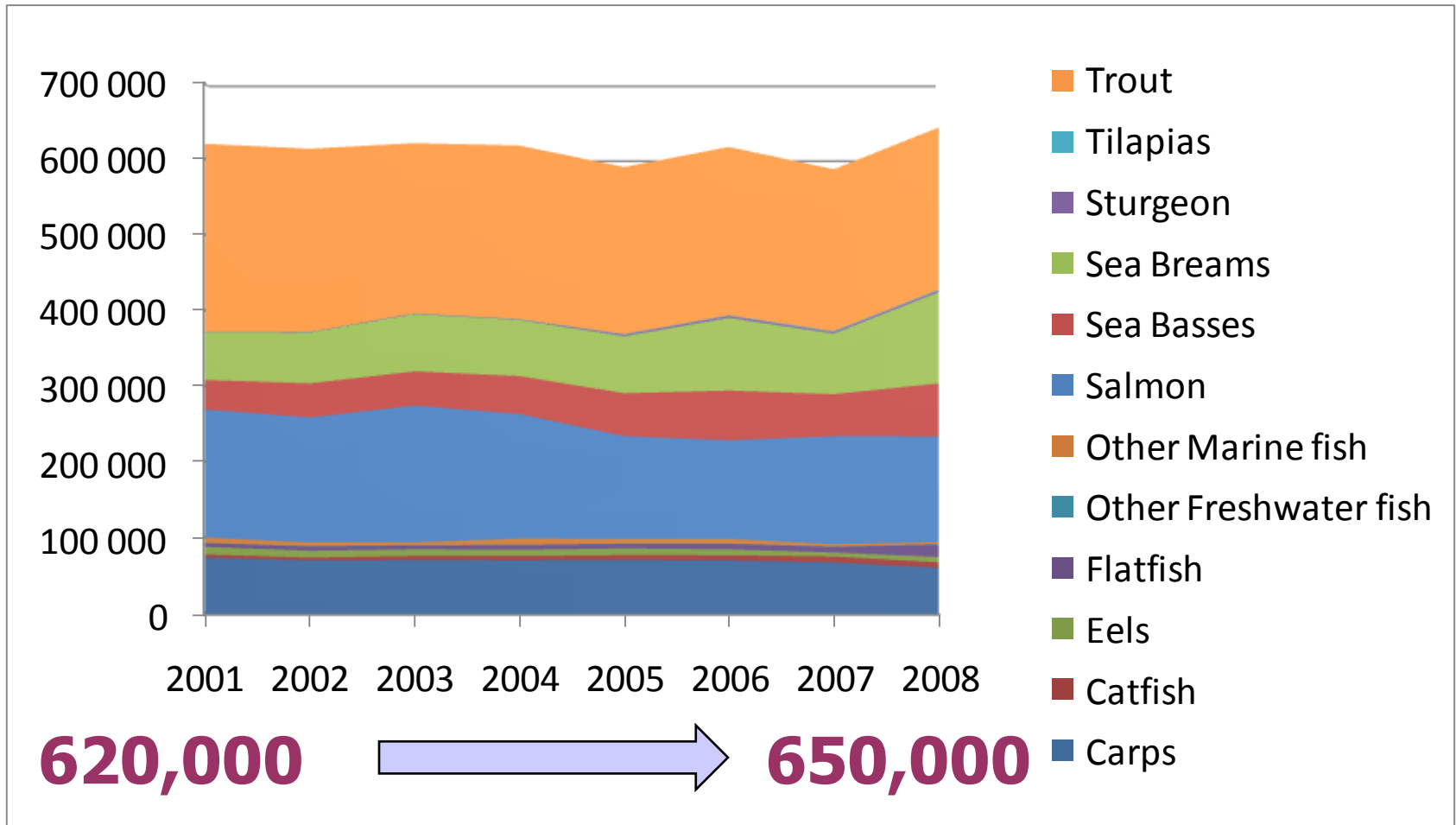
The Aquaculture Strategy (2002)

- Fundamental issues were the maintenance of
 - Increasing Competitiveness
 - Raising Productivity
 - Assuring Durability (sustainability)of the European aquaculture sector.

Target of 4% annual growth

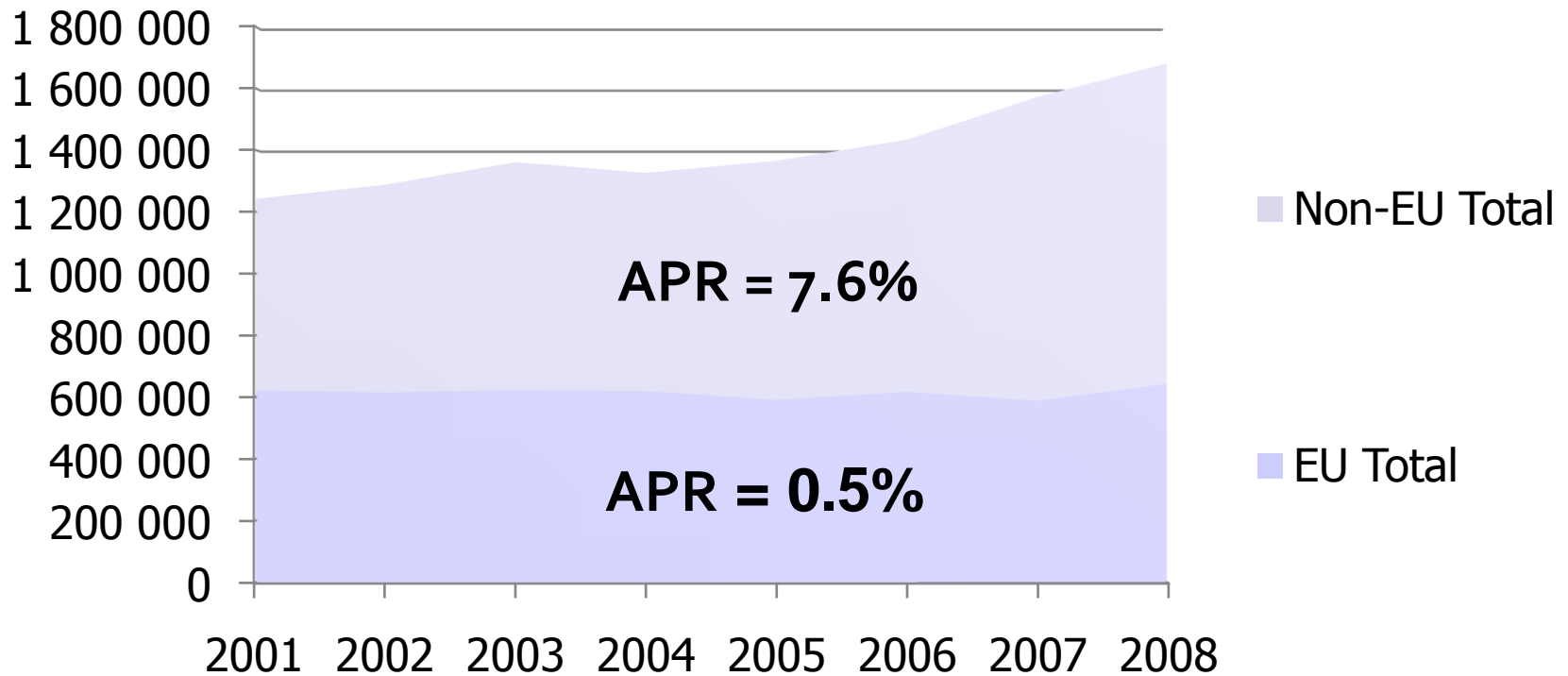


EU fish farming development





European fish farming





Overall EU position in 2007

- EU represents one of the largest aquatic food markets in the world
- Strong legislation on environment, food safety and public health for EU producers
- Concentration of buying power in the MRS
- Changing market demands (consumer-friendly)
- Strong currency (€)
- Increased import competition (Asia, Latin America – Norway, Turkey)



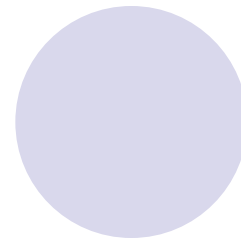
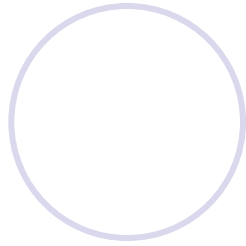
Producer position by 2007

- Range of issues (non-exclusive)
 - Limited access to sites
 - Difficult financial conditions (seed loans, working capital...)
 - Changing & competitive marketplace
 - Insufficient access to health treatments
 - Geographic fragmentation of sector
 - Fragmented approach to markets
 - Structural changes in the sector
- Question....
 - How many of these issues are managed in Brussels?



Aquaculture Strategy Review

- 5 year assessment/review – started in 2007
 - Wide ranging consultation efforts
 - Intra-Commission consultation involved >20 ad-hoc committees & many DGs
 - Plus legal services (i.e. do any actions proposed affect existing Directives/Regulations?)
- Revised Strategy (COM (2009) 162 final) published in April 2009



What's new

- Aims to give new political impetus
 - Focus on role of public authorities
- Objectives
 - Promote competitiveness
 - Ensure continued growth & sustainability
 - Improve governance & image



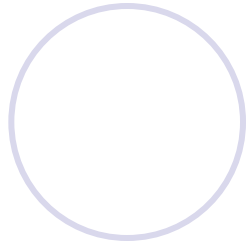
Promoting competitiveness

- Enhance R&D
 - appropriate funding & support for EATIP
- Access to space
 - Equal competitor
- Ensure reactiveness of aquaculture to market demands
 - POs & Standards (Eco/Organic)labelling)
- International dimension
 - Quality & environmental standards



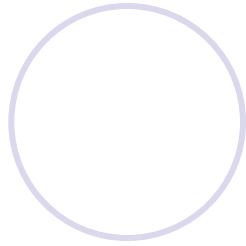
Growth & Sustainability

- Compatibility with the environment
- High-performance production sector
 - High level of animal health & welfare
 - Availability of treatments
 - High quality sustainable Fish feeds
- Consumer health protection
 - Health benefits of aquatic food



Governance & image

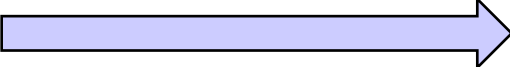
- Better implementation of EU legislation
- Reduction of administrative burden
- Ensure proper stakeholder participation
 - Appropriate information to the public
- Adequate monitoring of the sector
 - Identify & monitor indicators
 - Value-chain price monitoring (Observatory)



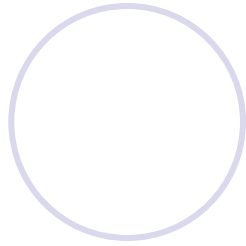
Strategy Conclusions

- Growth potential is identified
- Wants better leadership and guidance (for stakeholders & administrations) to assure

Consistency & Clarity in policy design

Challenges  **Opportunities**

All actors – private & public – to be committed to achieving the ambitions



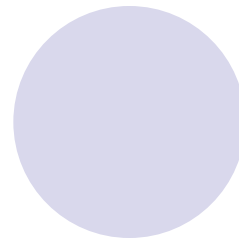
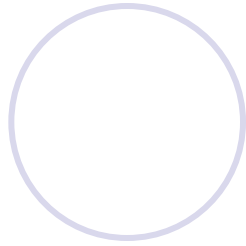
What will happen?

- The new Communication aims to give new impetus to aquaculture development....plus
 - Review of Common Fisheries Policy
 - Review of the Common Organisation of the Markets for Fisheries and Aquaculture products
 - Maritime Strategy for Europe



Mobilisation at National/Regional levels

- Policies lead to actions
- ‘Enabling environment’ needs to be built
 - ‘infrastructural’ conditions
 - Producer organisations adapted to reality
 - Licenses – Site planning
 - Health treatments
 - Equal-rights recognition
 - Information/benchmarking
 - Efficient/effective RTD & transfer



Conclusions



- Pro-active and transparent dialogue at all levels
 - Brussels/Commission cannot resolve all issues
- Effective policies need 'tools' for implementation
 - 'Tools' are being put into place but
 - Effective 'European' actions will be increasingly dependent on National & Regional reaction & motivation