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INFORMATION

From: General Secretariat of the Council

To: Delegations

Subject: Update of the Strategic Guidelines for the Sustainable Development of EU Aquaculture, revised outline

Delegations will find attached information on the above-mentioned subject, as received from the European Commission services.

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UPDATE OF THE STRATEGIC GUIDELINES FOR THE SUSTAINABLE DEVELOPMENT
OF EU AQUACULTURE

REVISED OUTLINE

1. Introduction

1.1. Why updated guidelines now?

This subsection will refer to the recommendations from the interim evaluation of the Open Method of Coordination (OMC) for the sustainable development of EU aquaculture¹. This subsection will also consider important policy developments since the adoption of the 2013 Guidelines (including new roles of aquaculture in broader EU policies such as decarbonisation or sustainable food systems), and the post 2020 programming period for EU funds.

In particular, updated guidelines will serve to pursue, in the area of aquaculture, the objectives laid down in the Political Guidelines for the next European Commission 2019-2024. In particular, they should ensure the contribution of aquaculture to a "European Green Deal", a "Farm to Fork" Strategy on sustainable food along the whole value chain, the preservation of rural areas, a "zero pollution" strategy, a "New Circular Economy Action Plan" and the "Clean Planet Strategy".

1.2. Work on the basis of the Open Method of Coordination (OMC)

This subsection will describe the work done so far in the context of the OMC, and how this work has promoted the objectives established in the Common Fisheries Policy Regulation (CFP Regulation).

- **CFP Regulation:** the overall objectives identified in CFP Regulation are the promotion of a sustainable and competitive aquaculture in the EU that creates growth and jobs. More particularly:

- (1) Quality food supply, food and nutrition security (bridge gap between demand and wild capture);
- (2) Contribution to economic development and employment in coastal and inland areas;
- (3) Sustainability: preservation of the environment, animal health and animal welfare.

¹ The external study of this evaluation is published on <https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>. A Commission Staff Working Document is under preparation.

- Brief description of the work in the context of the OMC and the link between the Strategic Guidelines and the other OMC tools (Member States' Multiannual Aquaculture National Strategic Plans- MANPs, Guidance documents on EU legislation, exchange of good practices).
- Brief description of 2013 Guidelines and their main achievements: these guidelines identify four priority areas to be addressed in order to unlock the potential of EU aquaculture: administrative procedures, coordinated spatial planning, competitiveness and a level playing field. They also describe targets and recommendations for the Commission, EU Member States and the Aquaculture Advisory Council (AAC).
- Description of key conclusions of the interim evaluation of the OMC (including the mid-term reviews on the implementation of EU Member States MANPs).
- Description of relevant recommendations of the AAC.

1.3. Current state of the sector

This section will provide a description of key conclusions from the 2018 STECF Economic report on Aquaculture (compared to data in 2013 guidelines) and other relevant documents (e.g. Blue Economy report, FAO SOFIA report). The following issues will be covered:

- Economic data, including also data on imports/consumption; job creation potential, percentage of world production, type of companies- SMEs, etc.
- Description of the sector (species, type of production, location). Note that despite of its diversity, the aquaculture sector in the EU is still concentrated in few species and countries.
- Overall description of performance by species/sea basin/method of production.
- Evolution of organic aquaculture.

1.4. New developments since 2013

- Description of the role of aquaculture in broad EU policy objectives (why promoting sustainable EU aquaculture remains important today?):
 - Food and nutrition security for a growing population (FAO, *Food from the Oceans* scientific opinion)
 - Achievement of Good environmental status by 2020 according to the Marine Strategy Framework Directive, and Good status by 2027 as per the Water Framework Directive.
 - Climate action agenda/decarbonisation: climate mitigation and adaptation in the sector and contribution by the sector to these objectives.
 - New Bio Economy Strategy - potential of biomass for and from aquaculture for food and non-food uses and circular economy
 - Blue Economy/regional development

○ One Health/Antimicrobial resistance

- Increasing role of algae in sustainable solutions
- Development of new production methods: e.g. Recirculation Aquaculture Systems (RAS)
- Increased number of EU-funded projects on aquaculture including EMFF funding (both shared and direct management)
- Public perception and social acceptability of aquaculture and its products
- Increased competition with imports for some species (trout, seabass, seabream)
- International initiatives (FAO, GFCM)
- Marine litter from aquaculture
- Increased use of private certification
- Increased attention to fish welfare
- Increased attention to health claims of fish/seafood consumption, as well as environmental footprint.

2. Updated Strategic Guidelines- General

2.1. Brief description of consultation process on the guidelines

2.2. Identification of areas to be addressed

What remains to be done to achieve the EU policy objectives in the sector?

(1) Administrative procedures

There has been progress but administrative burden remains an important obstacle (analysis of the reasons behind this).

Suggest the consolidation of good practices on simplification of administrative procedures, based on exchanges on practices in the context of the OMC as well as EU-funded studies², and provide for assistance to Member States that want to apply these good practices.

These good practices should also identify ways to ensure better outreach to regional/local authorities involved in these procedures, including also authorities who deal with environmental protection and wild fisheries management and conservation. They should also provide good practices for increasing social awareness and acceptability of the sector, since this is a key issue for the growth of EU aquaculture (e.g. stakeholders' platforms).

In order to encourage greater acceptability of aquaculture farms by local population, the use of aquaculture facilities that try to fit in the overall natural surrounding environment, minimising the visual impact of aquaculture sites and with a reduced environmental footprint, should be encouraged.

² The Guidelines resulting from the TAPAS project funded under Horizon2020 could help in defining these good practices.

This section should also address ways aiming at promoting the understanding and simplifying the application of relevant EU legislation for national and regional authorities and farmers, including the legislation related to food safety and novel foods.

(2) Spatial planning

There has been progress but facilitating access to space and water for aquaculture remains relevant.

The reviewed guidelines could consolidate best practices in integrating aquaculture in spatial planning into a specific guidance, including in view of the obligation of EU Member States to adopt Maritime Spatial Planning (MSP) plans by 2021 (notably, identification of areas suitable for aquaculture, including Strategic Environmental Assessment in this planning process). The guidance should cover both marine and "inland planning" (i.e. identification of most suitable areas for freshwater aquaculture, but also RAS). These practices should also cover the added value of recirculating aquaculture systems, as well as prospectively foresee spatial planning of offshore aquaculture, notably multi-use platforms (e.g. with floating offshore wind). The guidance should also cover aspects of the administrative procedures for spatial planning, including ensuring that local population is given the opportunity to participate in the consultation and/or planning processes.

(3) Consumer information

There is a need to ensure better information to the consumer regarding the value of EU aquaculture products. This section should cover the following issues:

- (a) Description of consumer perception of the sector.
- (b) Identification of ways to improve communication on sustainability of EU aquaculture and exploiting the value of EU aquaculture as a source of food that is local, fresh, healthy and subject to high sustainability standards, including through labelling, traceability, branding, scientific information. The compilation of a reference list of all EU legislation with which the aquaculture sector needs to comply with, to be made publically available, could also be a useful tool. The important role of retailers in providing information to the consumer and assisting to make sustainable choices should be duly taken into consideration.
- c) Increasing the knowledge of consumers on the new products with added value (e.g. alternative proteins, food derived from algae) to increase the EU internal demand.

(4) Producers and market organisation

The following issues should be addressed:

- a. Improved market organisation and structuring of the sector through the support to producer organisations, including transnational producer organisations, and inter-branch organisations.
- b. Further integration of value chains (ex. link of producers to processors and retailers).

(5) Human and animal health and animal welfare

The following issues should be addressed:

- Disease management (notably in the shellfish sector), including improving the reporting on diseases among EU MS, the development of codes of practice to deal with non-listed diseases, and assessing the impacts of climate change on fish health (e.g. emerging diseases) as well as the impact of microbiota on fish health and environment.
- Promotion of good husbandry practices and technologies to improve fish health and welfare, including environment enrichment, functional feed, etc.
- Availability and use of veterinary medicines and contribution of the sector to the fight against anti-microbial resistance, i.a. promoting the use of pharmaceuticals which do not impact on the environment, in line with the Strategic approach on pharmaceuticals in the environment³, as well as alternatives to medicines such as vaccination.
- Development of good practices on fish welfare during farming, transport and slaughter
- Promotion of the development and application of common reliable fish welfare indicators.

(6) Environmental performance

This section should provide recommendations on how to improve the overall environmental performance of the aquaculture sector and address the following issues:

- Fostering a better understanding of how to implement EU environmental legislation in the EU aquaculture sector, including by raising awareness and implementing existing guidelines on the application of EU environmental legislation (e.g. aquaculture in Natura 2000 areas; Commission staff working document on the application of the Water Framework Directive and the Marine Strategy Framework Directive in relation to aquaculture) in EU Member States and regional administrations.
- Facilitate the feeding of the aquaculture species with sustainable feed materials and novel feed additives in order to reduce the environmental footprint of aquaculture. The use of innovative solutions to incorporate non-fish origin feed is also to be considered, while taking into account fish welfare and nutritional value (e.g. Omega3 content).
- Assessment of the requirements of an Environmental impact assessment of aquaculture projects, including assessment required under the Water Framework Directive.
- Development and optimisation of appropriate environmental monitoring protocols, diversified per species and type of aquaculture, to ensure the sustainability of the activity in local scale and to allow for consolidated assessments of the environmental impacts and benefits of aquaculture.
- Contribution of aquaculture to the achievement of the Good Environmental Status target (Marine Strategy Framework Directive) and Good Status objective (Water Framework

³ https://www.ec.europa.eu/environment/water/water-dangersub/pdf/strategic_approach_pharmaceuticals_env.PDF

Directive) in EU environmental legislation/ further mitigation of pressure of the sector on the environment (e.g. nutrient and other emissions, escapees).

- Promotion of more environmentally performant practices, including diversification to lower trophic species and algae, Integrated Multi-Trophic Aquaculture (IMTA), organic aquaculture, or good aquaculture practices such as following.
- Environmental performance of RAS.
- Promotion of aquaculture with environmental services (pond aquaculture, seaweed aquaculture, low impact aquaculture in Natura 2000 areas).
- Circular economy approach/bio economy.
- Marine litter.
- Introduction of alien species, including as a consequence of climate change.
- Best practices on management of predators, in respect of the Habitats and Birds Directives.

(7) Climate Change

This section should provide recommendations on how to ensure:

- Climate mitigation:

- Promote measures to reduce carbon footprints of aquaculture sites e.g. by increasing energy efficiency on site, the generation and use of renewable energy, optimising logistics
- Promote carbon capture and sequestration e.g. by aquatic plants
- Promote circularity using agriculture waste for production of added value products

Climate adaptation:

- prepare the adaptation of the sector to that impact, including through the development of sector specific plans within EU Member States Climate Adaptation Strategies providing for example for the diversification to climate change resilient species or the adaptation of aquaculture installations and aquaculture technology.
- promote aquaculture for the preservation of coastal wetlands, which increases protection from sea level rise and are also efficient for carbon sequestration.

The integration of relevant results of recent EU-financed research findings such as by CLIMEFISH, CERES or SOCLIMPACT should be ensured.

(8) Innovation

This section should provide recommendations on the following topics:

- (a) Cooperation of governments, industry, research, education both at national (i.e. synergy between national research programmes and participation of industry in research and innovation activities; incentives for research to develop marketable solutions, etc.), and regional/local levels.
- (b) Setting priorities and finding synergies for EU funded research and innovation (Horizon Europe, EMFF, LIFE, Interreg, etc.). Priorities in innovation should also be identified in a

sectoral basis (land/marine, different species including algae), to guide developments towards most urgent issues.

- (c) Ensuring proper dissemination of results and impact of innovation.
- (d) Bringing innovation to the market- promoting investment in innovative solutions.
- (e) Skills development (e.g. up-skilling operators in new species, new technologies and good practices, including for small production sites, and in the context of Article 11 of the Animal Health Law)

A particular focus should be put on how innovation can help bring diversification to the sector, including through domestication of local species and the use of low-trophic species such as algae and invertebrates. Product diversification should also be part of innovation.

Recommendations on innovation should also incorporate the notion of integration of the priorities set for EU aquaculture. The multiple aspects of the activity identified in the guidelines should be tackled, when possible, through an encompassing approach: production health considerations, environmental sustainability, product attractiveness, etc.

(9) Control

This section should describe ways to improve control and fight against fraud in the aquaculture sector regarding both EU and third country production. The Commission proposal for a new Control Regulation⁴ provides for traceability and control requirements applicable to all aquaculture products (with the exception of algae), included those imported from non-EU countries. The eventual need to develop control mechanisms for algae in the future should be examined. The IUU Regulation⁵ currently excludes not only aquaculture products, but also fish feed from its scope.

(10) Integration of aquaculture in the local economy

This section should identify best practices for the optimal integration of aquaculture activities in local economies and the creation of synergies with other sectors (e.g. fisheries, agriculture, tourism, education etc.), with the objective of achieving the greatest economic and social benefits for local communities and attracting young population to remote rural areas . The work of FARNET on Community-Led Local Development initiatives could be useful in this respect.

3. Sector-specific Strategic Guidelines

This section will provide specific recommendations for the following sectors:

- Finfish
 - freshwater
 - marine
- Molluscs
- Crustacean

⁴ COM/2018/368 final

⁵ Council Regulation (EC) No 1005/2008 of 29 September 2008 (OJ L 286, 29.10.2008, p. 1)

- Algae
 - Microalgae
 - Macroalgae

Specific recommendations for Integrated Multi-Trophic Aquaculture should also be provided.

4. Complementarity with European Maritime Fisheries Fund and other funds

This section will promote coherence between national Operational Programmes and EU and national aquaculture strategies. It should also allow for exploiting the complementarity of funds under the new Multi-annual Financial Framework (MFF) and ensure synergies of multi-sector approaches. Other options to be considered include the development of a guide for EU funding sources available for aquaculture and a database of EU-funded projects in the sector, as well as guidance on best practices for providing access to the sector to funding. The possible concertation for the “transnational” funding of certain initiatives could be explored and the funding under Interreg could be further enhanced.

5. Regional cooperation- role of sea basin strategies and regional policy

The objective of this section is to describe how to ensure that sea basin strategies and macro-regional strategies from regional policy contribute to the sustainable development of EU aquaculture.

6. International cooperation and contribution to SDGs

The objective of this section is to refer to international initiatives developing global standards for aquaculture, including FAO and GFCM, and to assess/put into perspective the role of the EU and EU Member States in these initiatives. This section would also provide recommendations on how to ensure coherence between the EU aquaculture policy strategy and EU external action initiatives; e.g. Sustainable Fisheries Partnership Agreements (SFPAs), trade agreements, etc.

