

“BOOSTING THE DEVELOPMENT OF EUROPEAN AQUACULTURE”

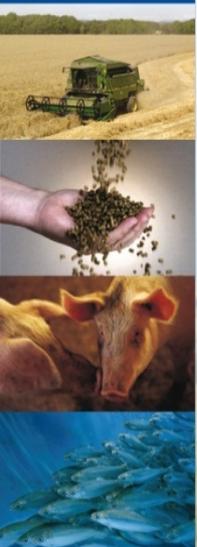
Resource Use in Aquaculture

Perspective of the European Fish Feed Industry

7 November 2012

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Vice-Chairman of FEFAC Fish Feed Committee



FEFAC Fish Feed Committee

2008

- EC: «Strategy for the sustainable development of European Aquaculture», EP: «Aquaculture in the EU»
- Aquaculture regulated by some 150 Community regulations; coordinated framework and simplified regulation needed
- EU feed legislation based on land animals, not to specific needs and conditions of the aquafeed sector

2009

FEFAC set up dedicated **Fish Feed Committee to:**

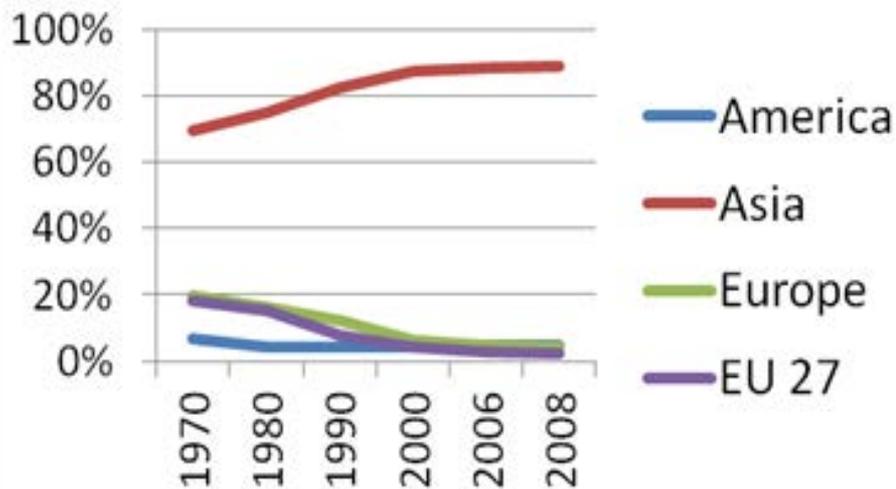
- Identifying a common approach to address and solve sector problems related to EU feed legislation
- Strengthen relationship among stakeholders along the Aqua value chain

20 members and fish feed experts from the EU countries as well as Norway.

- Chairman: Alberto Allodi, Italy, Vice-Chairman: Karl Tore Mæland, Norway

The EU Common Fisheries Policy reform

- FEFAC welcomes EU effort to promote development of EU Aquaculture as strategic objective
- FEFAC encourages the EU policy-makers to set forth specific growth targets for EU Aquaculture to **triple** its current level of production



EU imports 10 mill tons of seafood (60% of seafood supply)

Aquaculture:

EU	650,000 t
Norway	760,000 t
Turkey	100,000 t



The EU Common Fisheries Policy reform

- EU production is losing market share in favour of low price competitors
- EU aquaculture and fisheries should both defend their significant niche market and challenge the low price imports
- Aquaculture is an important resource to produce high quality seafood and a stable supply of competitive high quality feed is a key factor of success
- R&D efforts also need to be intensified in order to fulfil the new feeding needs
- A level playing field with third country is highly needed to face this challenge





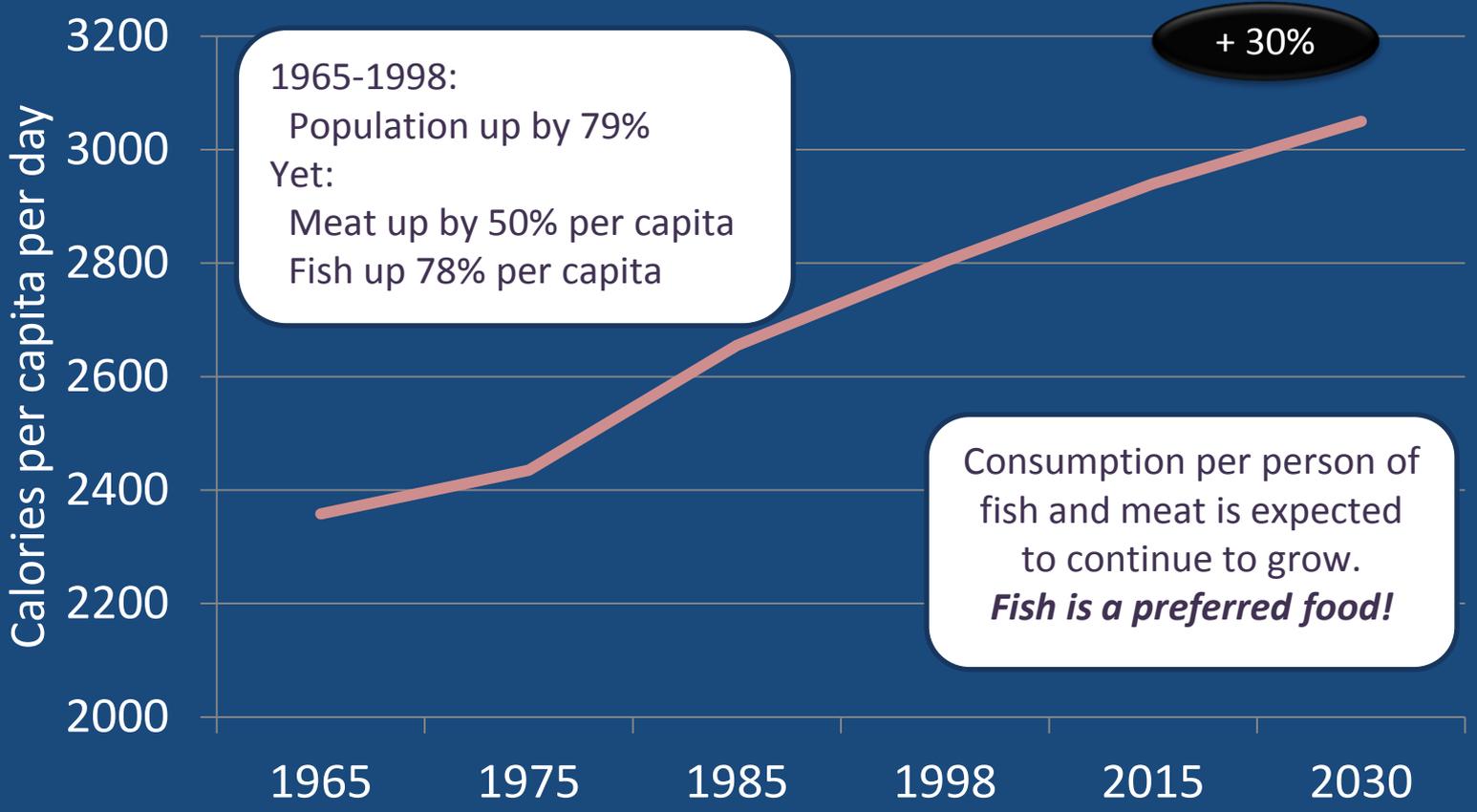
Aquatic animal feeds, challenges and opportunities

- Sustainable aquaculture needs sustainable feed supply
- Innovative formulations allow fish farmers to become “net fish protein producers”, without compromising fish health and welfare
- Safe, healthy and sustainable seafood from aquaculture will contribute to feeding a growing world population!



Economic growth will influence the food consumption

Calory uptake per capita per day 1965-2030



Source: United Nations, Department of Economic and Social Affairs

Sustainable feed supplies is about sustainable raw material supplies

■ Substitution

- Plant protein concentrates
- Vegetable oils

■ Utilization of nutrient streams

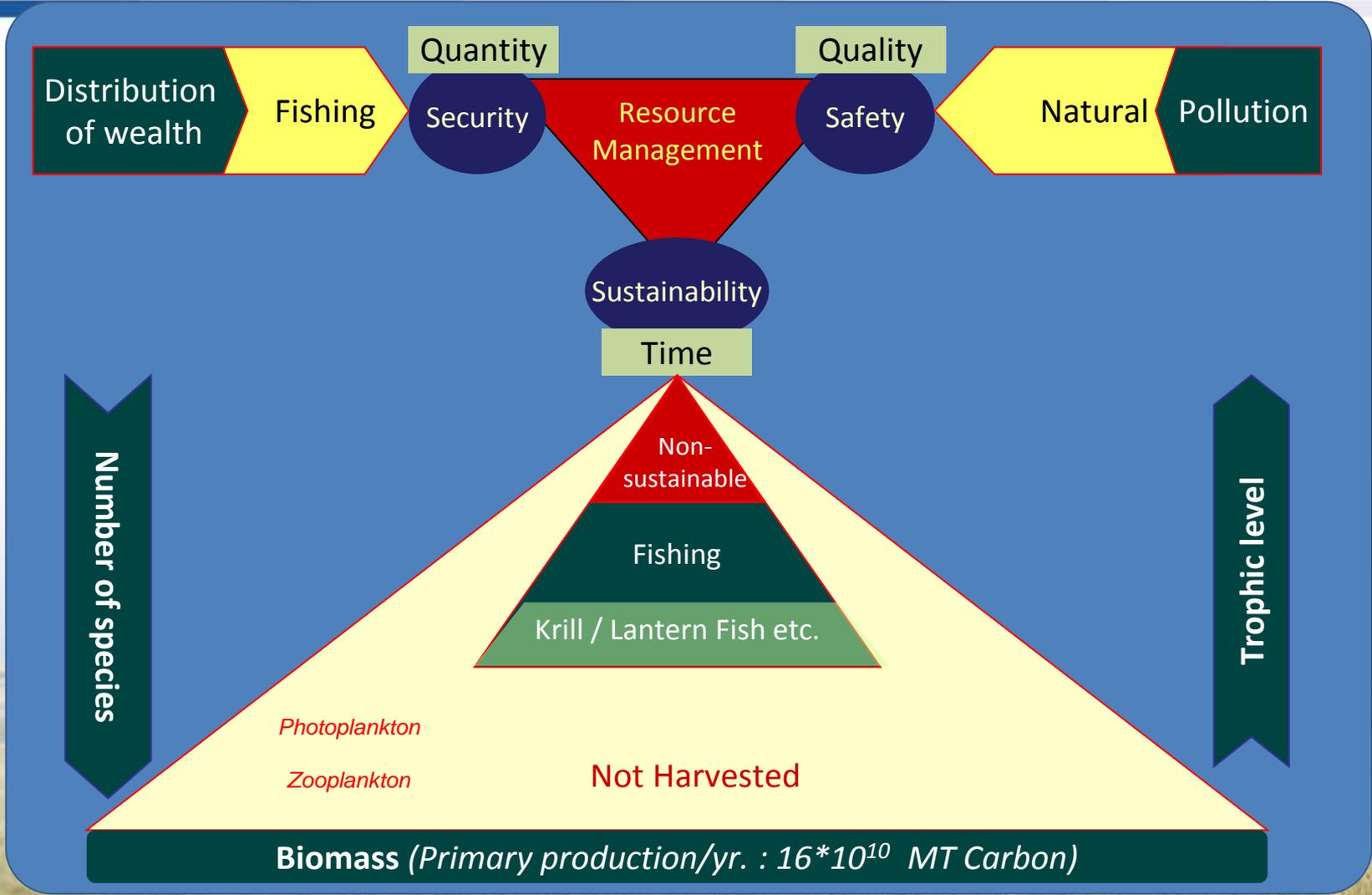
- Recovery in Fish Industry Nutrient Streams
 - Trimmings
 - Hydrolysates
- Re-introduction of Non-ruminant PAPs

■ New sources

- New marine species
- Algae
- Etc.

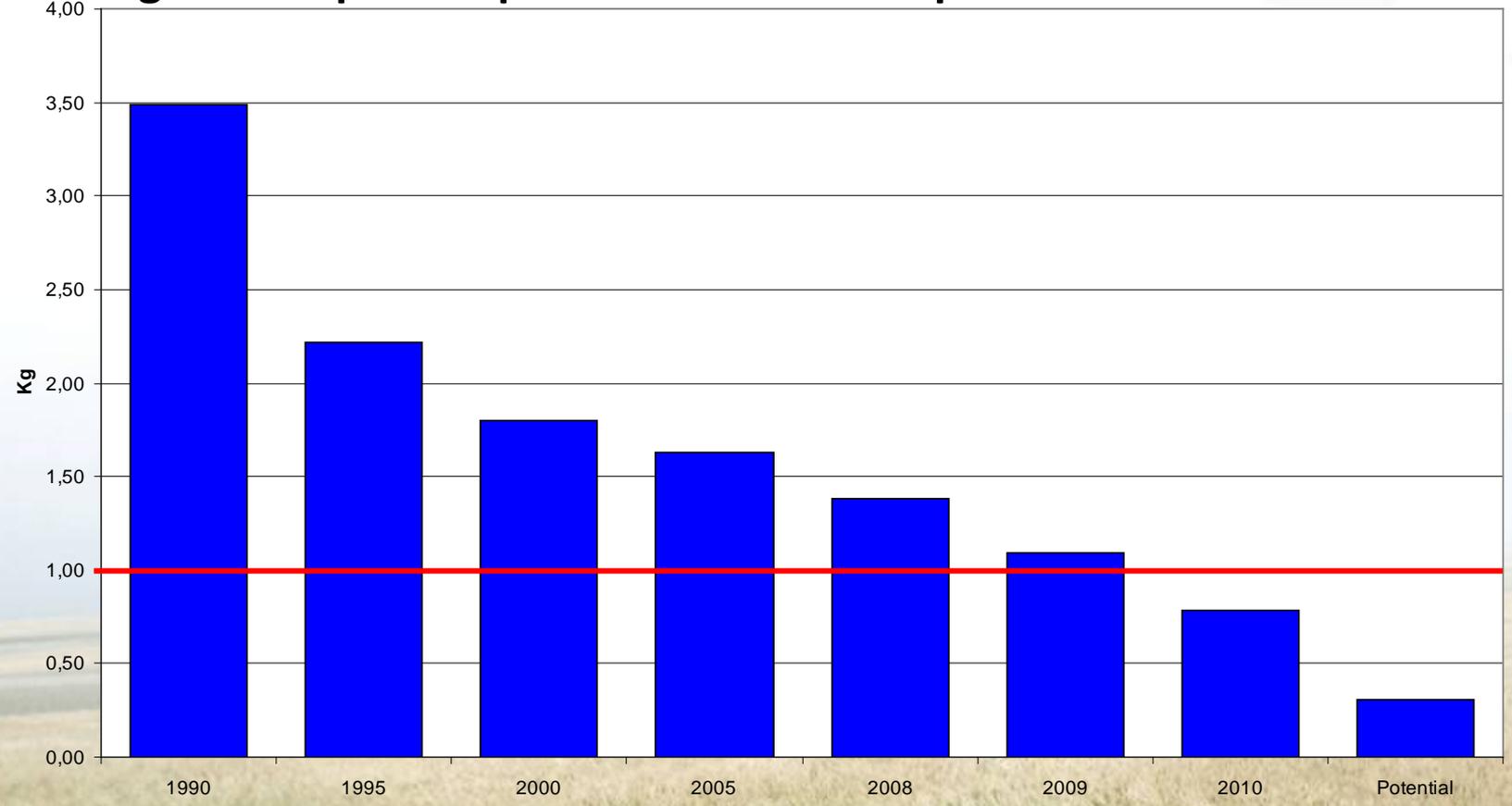


Challenge: 47% of total primary organic carbon production comes from the oceans but seafood is only 3% of human caloric consumption world-wide.



How far are we?

Kg salmon protein produced versus fish protein used in feed



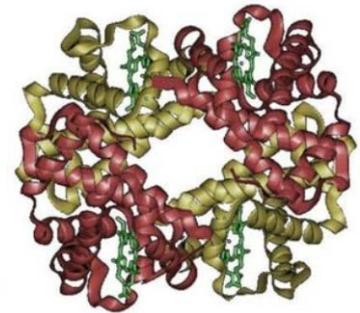
Aquaculture as Net Fish Protein Producer

- Aquaculture consumes fish – it also produces fish
- We use less fish protein in the feed than fish protein produced through aquaculture!



Processed Animal Proteins: the EU example

- → limited possibilities for use in aqua feeds:
 - Non-ruminant haemoglobin (blood products)
 - Collagen proteins (fats)
 - Hydrolysed feather meal
- potential substitutes for both fishmeal and fish oil



- Non-ruminant PAPs potential availability estimated at 1.3-1.5 millions Mt/year in EU → now wasted or underutilized (pet-food)!
- Good nutritional value for farmed fish and no food safety or fish health issues (EFSA report)
- EU decision to lift the ban for fish-feed in 2013 is positive for sustainable fish-feed production but market acceptance still a challenge



Conclusions

- The aquaculture feed industry has worked consistently and successfully to improve efficiencies and sustainability
- We are well equipped to meet the future opportunities and challenges as an industry.
- To do this we need:
 - continued R&D effort
 - good dialogues with key stakeholders
 - political support for improved resource utilization in the value chain
 - sound and practical regulatory framework



**Thank you for your
attention!**

FEFAC

Fédération Européenne des
Fabricants d'Aliments Composés

Europäischer Verband
der Mischfutterindustrie

European Feed
Manufacturers' Federation

