



FEDERATION OF
EUROPEAN
AQUACULTURE
PRODUCERS

ANNUAL REPORT

2011

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About FEAP

FEAP is the united voice of the European aquaculture production industry, being the Federation of National aquaculture associations in Europe that represent professional fish farming.

With 26 members drawn from 22 States across the European continent, the FEAP represents

- over 1.85 million tons of produce
- Ex-farm value of over € 8 billion
- over 70,000 direct jobs in coastal & rural areas

FEAP continuously supports and promotes the responsible development of the European aquaculture sector and, through diversified support actions, develops and provides the common positions and opinions of the European producers.

Focused on fish farming, FEAP represents a range of different farmed species that includes:

- | | |
|------------|-------------|
| • Trout | • Sea Bream |
| • Salmon | • Turbot |
| • Carp | • Cod |
| • Sea Bass | • Sturgeon |

There are many other species that are reared, both in fresh and salt water, and details on the levels of production reported can be found in the section on 'Facts & Figures' at www.feap.info. Additional statistical information on aquaculture is provided by the FISHSTAT service of the Food and Agricultural Organization of the United Nations (www.fao.org) and the European Commission's Directorate General for Maritime Affairs and Fisheries – DG MARE (ec.europa.eu)

Established in 1969, FEAP has adapted to the numerous changes seen in European production and, in line with the expectations of society, provides transparent information on sectoral activities and developments.

FEAP is run by professionals for professionals, meaning that all members are active in fish farming and thus very much aware of the main issues concerning aquaculture and its development.

FEAP's Mission

- Pursue and improve its coordination role of the goals of its National member associations and the aquaculture profession.
- Assure a pro-active position in front of all relevant authorities.
- Provide accurate information and sound rationale to decision makers.
- Guarantee the communication of unbiased information on aquaculture processes and products to the consumer.
- Guarantee valid, consensual and timely responses to key issues.
- Develop the structure and operations required for the representation of a dynamic and visible sector at European and worldwide levels.

Introduction

The average global fish consumption is 17.2 kg per person per year (9.1 kg from fisheries, 8.1 kg from aquaculture). This represents a total global demand of 110 million tons where a stable food fisheries supply is around 60 million tons; thus 50 million tons have to come from aquaculture. Moreover, with the increasing population forecast, by 2030 the total need will be around 160 million tons. If global fisheries remain stable, aquaculture production has to double to 100 million tons!

European aquaculture provides some 2.5 million tons of seafood and fish, with 1.3 million tons coming from EU States. This Annual Report gives a background on European fish farm production, the structure of the sector and the issues that affect its development. Fish farming is a multifaceted livestock-rearing activity, which is done throughout Europe but is dependent on matching a wide range of influences for success. Several case studies have been included to show this and how the sector can react and develop.

2011 has been a challenging year for FEAP following publication of the European Commission's proposals for a reform of the Common Fisheries Policy, which is the principle guideline for EU aquaculture development. Commissioner Damanaki provides her reflections on aquaculture within this while the FEAP President and several FEAP representatives give the background on positions and progress on a wide range of issues that the FEAP has addressed in 2011.

The European Union imports 65% of its seafood needs and the aquaculture of fish and shellfish provides clear potential for developments that will reduce this deficit. Nonetheless, Europe and the Member States need to establish the enabling environment that will allow this.

This report highlights a number of issues that reflect the needs of the profession, being a combination of technical, legislative and strategic topics – each of which affects how European fish farming can develop in the most sustainable way, including economic, environmental and social considerations. These topics have been debated both in FEAP meetings and formal committees and demonstrate the complexities faced.

FEAP understands that aquaculture needs to be better understood and supports sectoral transparency to achieve this. We look forward to moving forward, working with the profession, the policy-makers and other stakeholders, and assure the sustainable development of European aquaculture.

Message from Maria Damanaki, European Commissioner of DG Mare



Maria Damanaki is the European Commissioner for Maritime Affairs and Fisheries. She was born in the Greek island of Crete, graduated with honours from the National Technical University of Athens as a Chemical engineer and is the mother of three children. Maria Damanaki is a very well known politician in Greece and, overall, she served as a member of the National Parliament for more than 25 years. From 1986 to 1990 she was Vice-President of the Greek Parliament and, from 1991 to 1993, she was the leader of the political party "Coalition of Left and Progress". During her studies in the National Technical University of Athens she played a leading role in the underground student opposition to the dictatorship in Greece (1970-1974) and she was subsequently imprisoned by the regime after the students uprising of November 1973 and until the fall of the dictatorship in 1974. Maria Damanaki has also been elected twice as a member of Athens' City Council (1994-2000) and she is the author of four books on European issues, human rights and education.

What raised your first interest in aquaculture?

Seafood is an important part of Greek culture and our healthy diet.

As Commissioner in charge of the seafood-producing industries, I intend to promote both sustainable fishing and aquatic farming.

The natural productivity of the oceans is limited. Even if capture fisheries were well managed and thriving, they would not be able to meet the ever-increasing demand for fish and seafood, both globally and at EU levels. And the EU dependency on seafood import is increasing. We now import about two thirds of our total seafood consumption. A crucial part of the solution is aquaculture. Around 25% of all aquatic food products consumed in the EU come from aquaculture. We need to handle both the challenge of feeding the world sustainably and ensuring a competitive EU industry in this area. A challenge of this size obviously goes beyond raising my interest. It puts a real responsibility on our generation's shoulders.

What are in your view the major achievements of the European aquaculture sector in recent times?

The biggest achievement of the European aquaculture industry, in comparison to its competitors, lies probably in its overall level of environmental sustainability, which needs to be commanded.

Aquaculture also has additional functions beside food production. For example the inland pond system of Central Europe plays an important role in landscape design, water management and biodiversity. It is also significant from a traditional and cultural point of view in many places.

European aquaculture has also demonstrated its abilities to innovate. No one can contest that it provides amongst the highest quality of seafood consumed by EU consumers.

What are your priorities for the development of aquaculture in Europe?

We should first build on what has made the success of EU aquaculture so far. I want to support the innovative development of the existing forms of EU aquaculture, including freshwater aquaculture.

We need to foster growth and competitiveness. A competitive sector is a professional sector which can adapt quickly to market trends and consumer expectations. So my priorities will also go to reinforcing Producers Organisations and Inter-branch Organisations. And another marketing aspect which I consider crucial is information for the consumer and labelling. I would like more information on labels, in particular to inform consumers about the actual date of harvesting (or capture). This will benefit not only consumers, but also EU producers, who can highlight thereby the highest standards and freshness of their products. The information on the origin of the fish will allow the promotion of locally-farmed products. It is an opportunity to ensure sustainable jobs that produce a sustainable, high quality source of protein.

A third essential aspect is governance, at all levels: cutting red tape and speeding up licensing procedures is crucial to stimulate business and create favourable conditions for investments. The creation of an Advisory Council for Aquaculture should allow the voice of the sector to be heard both by the Commission and Member States.

Are you happy with the progress made in the CFP reform proposals?

The debate on the reform proposals tabled by the Commission is progressing intensively, at all levels, and primarily with the two bodies that will take the final decision, namely the Council of Ministers and the European Parliament.

There is no day without meetings or discussions, at technical or political levels, on a specific item of the CFP reform proposals. I particularly welcome the Conference organised in the European Parliament on the 7th March 2012. It demonstrated, once again, the emerging

consensus on the need to promote aquaculture in the EU.

As I have indicated already consumers should, in my view, be given information on the date of capture or harvest of the products they buy. Not everyone in Council and Parliament is, at this stage, supportive of my proposal on this point. But I will strongly defend it, and I hope that the aquaculture industry will be behind me in achieving this goal. This is certainly one important element that should help addressing the current absence of a 'level playing field' for EU businesses.

When do you think the commission proposals on aquaculture will be finalised?

It is difficult to anticipate when the European Parliament and the Council of Ministers will agree on common texts but this will not prevent us to act and progress beforehand. In a conference that we are organising in Salzburg in May 2012, I intend to lay the foundations of our common effort to promote aquaculture. We need action now to see concrete results as soon as possible. There is so much work to do and the active involvement of the industry is needed.

What are your hopes for EU aquaculture?

EU aquaculture has a bright future ahead of it, in providing consumers with high-quality and healthy products from farmed shellfish, marine and freshwater fish.

However, today, the potential of EU aquaculture is not being fully realised.

Aquaculture is part of the answer to the problem of seafood security, as it carries a strong potential for sustainable growth and employment in coastal and rural areas. My hope is that with the reform of the CFP and its accompanying financial instruments (European Maritime and Fisheries Fund), a new impetus will be given to the EU aquaculture industry.

Message from Arnault Chaperon, FEAP President



Arnault Chaperon is the CEO of Viviers de France/
Viviers Marins (France), now a part of the Norway
Seafoods Group.

*Since when have you been involved
with FEAP and when were you elected
President?*

I have been involved in FEAP meetings for 7 years now, starting in 2005. After 3 years as a vice-president, I was elected President during the annual meeting that was held in Bordeaux in 2010.

What is your real profession?

I am a fish farmer. I started in 1982, the period that was the start of marine aquaculture in Europe. In those days, we were more researchers, developers and handymen rather than real 'producers'. Once the main technical and biological problems were solved, it was also necessary to become entrepreneurs in order to assure the preparation, processing and commercialisation of our products. I was lucky that, after being active for 15 years in the farming of seabass, turbot and seabream, I was able to take up the farming of trout in fresh water in southwest France. This gives me a much wider understanding of the problems faced by European aquaculture, both in freshwater and marine environments.

*Today I run a company that
produces around 4,500 tons
of trout, and that is processing
many other products from
European aquaculture and from
fisheries as well.*

As such, I am confronted every day with the practical, commercial and legislative issues faced by European producers.

*What have been the major achievements
of FEAP for the sector in recent times?*

FEAP today plays an unavoidable role when it comes to providing the advice of the sector on all issues relating to professional aquaculture. It is actually wonderful to be able to speak with one voice after consultation with all of our members – this is in itself a major achievement of FEAP!

We can present some real success stories that FEAP has achieved in recent times that result from this representative position:

- Aquaculture is now considered a strong, important pillar of the CFP
- Aquaculture will not be forgotten anymore in the European Parliament debates on the CFP and seafood supply
- The different Directorates of the Commission listen and take into account our proposals, be these related to commercial or sanitary problems, as well as environmental or trade issues.

One of the big victories of FEAP during the last months has been to highlight the importance of the famous 'level playing field' principle.

In addition, I can also mention the issues on consumer information and accurate labelling, as well as access to space to be able to farm. We also want to see the clear separation of fresh fish from defrosted products on the 'fresh' fish counters – the retailer should recognise our efforts to provide the best quality for the consumer. These are topics that we regularly discuss at EU level.

What is the position of European aquaculture in the common fisheries policy, according to you?

We are very happy that aquaculture is now considered as an important, unavoidable component of the CFP, since for many years we were the poor cousin of fisheries. However, we have to stay very vigilant as we cannot say that Europe itself has a clear strategy on aquaculture by forcing each Member State to have its own strategy on aquaculture development. Europe also has to show

its willingness and find the way to reduce the burden of regulatory constraints that are now hampering aquaculture and preventing growth, development and job creation – key components of the EUROPE 2020 strategy.

We agree with the values put forward by the Commission. Tomorrow's aquaculture in Europe has to be green, innovative and diversified but we cannot accept constraints that are too fundamental on all levels while, at the same time, keeping the EU borders open for the import of products that do not respect the same rules. As such, we will only see an increase in cheap imports and further stagnation of our sector. Europe has to be a supplier – not just a customer!

How do you see the future development of European aquaculture?

We in FEAP believe that aquaculture can develop in Europe but, before developing new projects, we also need to preserve the existing activities. For European aquaculture to develop successfully, we have following wishes:

- A framework for the sustainable and loyal development of all types of aquaculture, with simplified regulations.
- A 'level playing field' that allows European producers to compete on equal terms.
- Clear information for the consumers, so they cannot confuse a European aquaculture product with others that have not been produced in the same manner and have not respected the rules we follow.

Dynamic and positive communication activities on our beautiful profession to reinforce and improve the image of our professional activities.

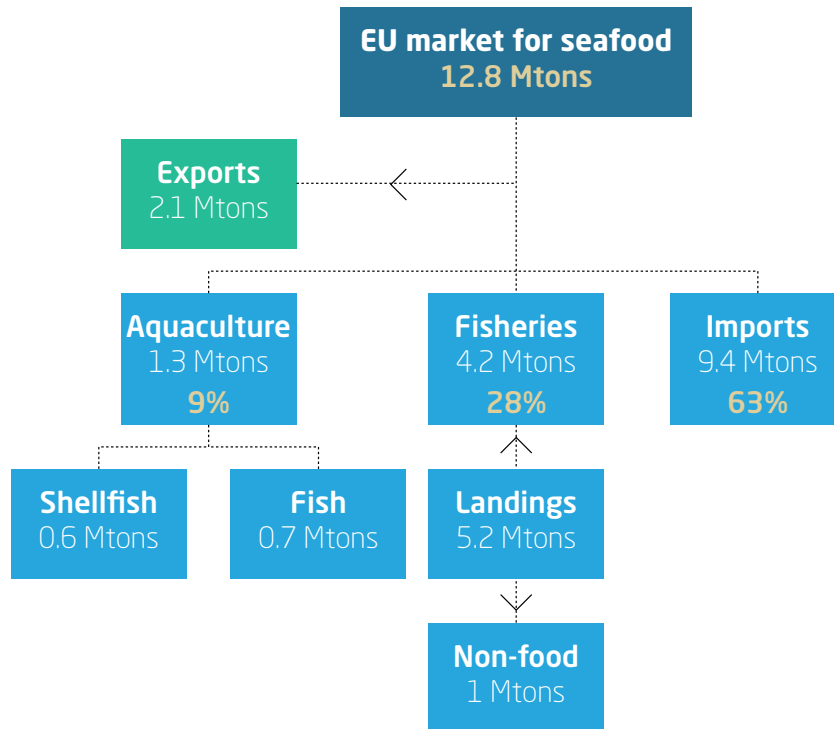
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The European Seafood Market

The European seafood market



The EU market is the largest in the world for seafood and per capita annual consumption levels have increased regularly in recent years to 26 kg.¹

EU aquaculture provides 1.3 million tons, split between fish and shellfish, representing nearly 25% of EU 'landings' (fisheries & aquaculture). The total quantity of 13 million tons for consumption has been quite stable since 2006.

It is to be noted that a significant proportion of these imports comes from non-EU aquaculture that includes European sources (Norway, Turkey and Faroe Islands) and non-European sources (e.g. salmon from Chile, shrimps and fish from Asia).

Since fisheries landings are foreseen to be stable in the coming years, the current import level of 9.4 million tons (63% of supply) can only be reduced if EU aquaculture

grows. Achieving this will require substantial changes to both strategic and practical approaches to aquaculture development.

The current dependency on imports could change in the future, particularly if the growing middle classes of Asia provide adequate home markets for products that have otherwise been exported to the EU. As more attention is given to healthy diets in the EU, following the rising incidence of obesity and diet-related diseases, seafood and aquaculture have increasingly important roles to play.

Furthermore, the EU is increasingly sensitive to issues affecting the security of food supply; agriculture is being asked to undergo 'sustainable intensification' so as to increase its output.

The challenge facing the EU is how to achieve these goals in the face of global competition.

See also: <http://tinyurl.com/dye9tx4>

¹ A.I.P.C.E – C.E.P.-EU Fish Processors and Traders Association 2011

European Fish Farming

This section provides summary data on fish aquaculture in Europe, separating information by the key production sectors, namely

- Marine cold water species
- Marine Mediterranean species
- Freshwater species

Since FEAP is not restricted to the European Union, the term 'European aquaculture' refers to the geographical area of Europe. The data collected by the FEAP is published in the facts & figures section of its website (www.feap.info).

A little history

In 1970, freshwater fish farming dominated European production – with some 135,000 tons² – principally common carp (73,000) and rainbow trout (43,000); 294 tons of salmon production was also reported.

By 1990 – only 22 years ago – carp production had reached 136,000 tons and rainbow trout 181,000 tons, out of a total 372,000 tons. These 2 species alone accounted for 85% of European freshwater fish production. The marine production of salmon had passed 100,000 tons, primarily due to a surge in production in Norway.

In the decade that followed, carp production dropped to +/-80,000 tons, following privatisation of state-run farms in Eastern/Central Europe. Trout production experienced slower growth, reaching a peak of 230,000 tons, accompanied by the marine on-growing of 60,000 tons of "large" rainbow trout (>1 kg size).

The most notable change was thus in marine fish farming. Salmon production reached over 600,000 tons and production in the Mediterranean and southern Europe showed strong development. The farming of European sea bass and Gilthead seabream had started in the 1980s, reaching 4,000 tons in 1990 and by 2000, nearly 100,000

tons were produced. Turbot farming was in its infancy, showing slow but steady growth and cod – in the North – was also introduced as a new species.

With over 1,000,000 tons of fish produced in European aquaculture, this sector had become – in less than 30 years – a significant supplier of high quality fish and seafood to the European seafood market.

Since 2000, fish farm production in the Member States of the European Union has suffered general stagnation, mainly in the freshwater sector, while growth continued initially for the Mediterranean species.

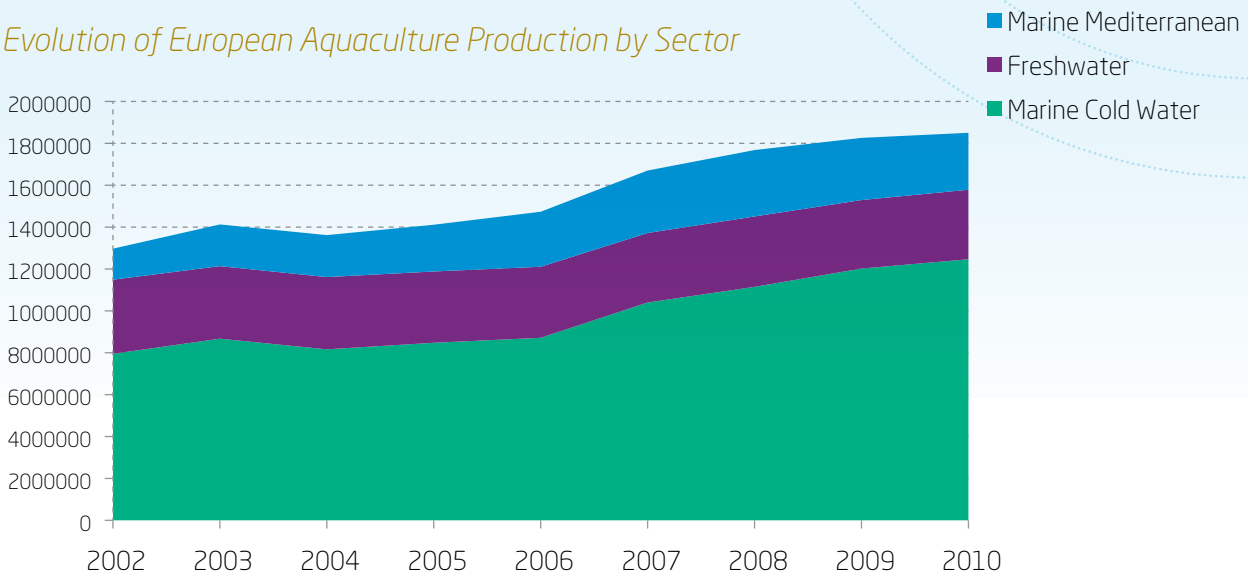
The combination of competitive market pressures, changing consumer preferences, strict environmental legislation and availability of licensed sites, have made the last decade a significant challenge for many of the sub-sectors of European aquaculture. Nonetheless, aquaculture remains the fastest growing food supply sector in the world – estimated at 6%/year by the FAO.

Aquaculture remains the fastest growing food supply sector in the world.

The following sections describe these developments in more detail.

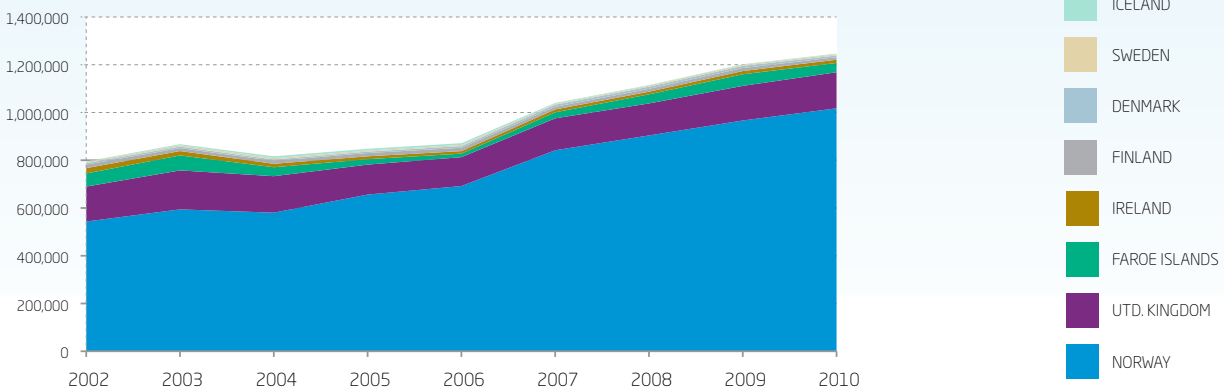
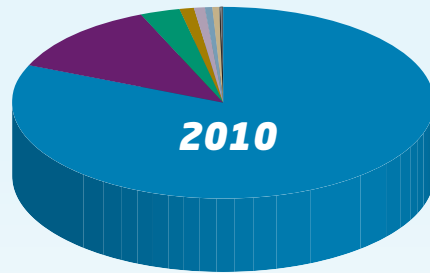
This figure confirms **marine coldwater** species as the largest sector, representing 67% of European production; this is followed by the **freshwater species** (18%) and the **marine 'Mediterranean'** species (15%).

Evolution of European Aquaculture Production by Sector



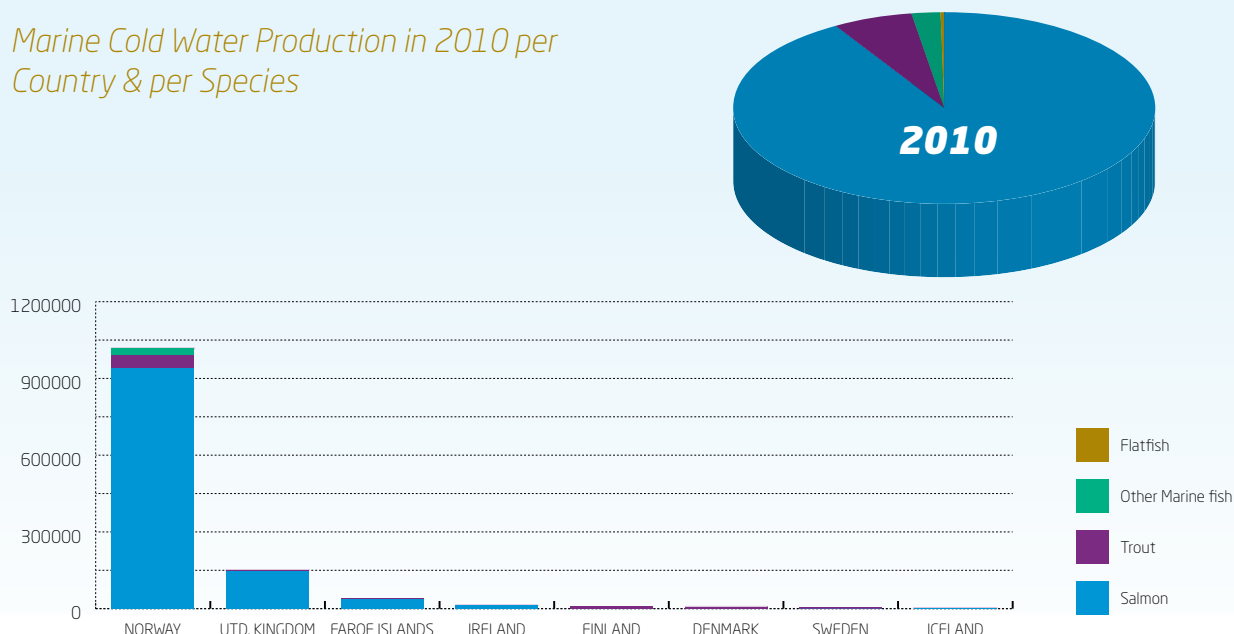
What these sectors represent - by country and by species - is explained in the following sections

Evolution of Marine Cold Water European Aquaculture Production (tons)



Marine Cold Water

Marine Cold Water Production in 2010 per Country & per Species



Key Observations for 2010

Production in this segment of European aquaculture has doubled since 2002 and the trend is still towards higher levels.

The dominant species is Atlantic salmon (90%), with the majority of this being produced in Norway (940,000 tons), followed by UK (147,000 tons) and the Faroe Islands (37,000 tons).

The other species produced are rainbow trout (large sizes > 1kg/fish), Atlantic cod and a small quantity of flatfish (mainly halibut, plus a little sole and turbot).

Prices have remained strong for salmon during the last two years.

The annual percentage growth rate (APR) of 5.8% reflects the rise for salmon while large trout production has decreased, notably in Norway.

Despite significant efforts, cod production has not really taken off due to profitability and biological issues; nonetheless, it is still a sector under development and the future may brighten.

A primary concern is to manage sea lice, an ectoparasite that infests salmon in particular, which can cause significant losses to the farm and control is needed to prevent potential infection of wild stocks.

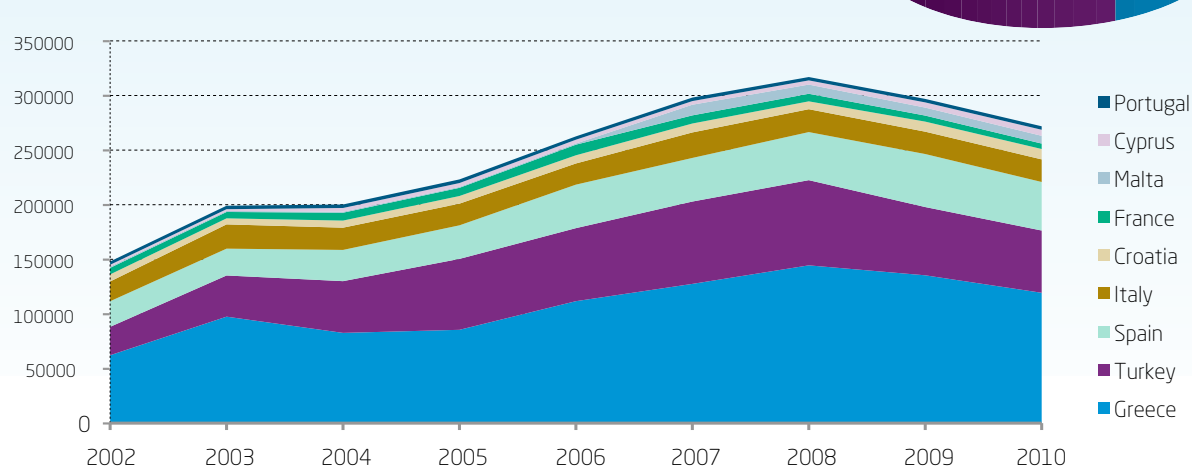
Representing both a public and professional concern, significant European and national research actions are underway to give solutions.

The potential effects of fish that escape from fish farms, such as may happen from storm damage to cages, is a regular topic of debate; advances in cage and net technology, accompanied by improved supervisory measures, have significantly reduced escapes. The profession works closely with national and regional authorities to reach the highest standards possible.

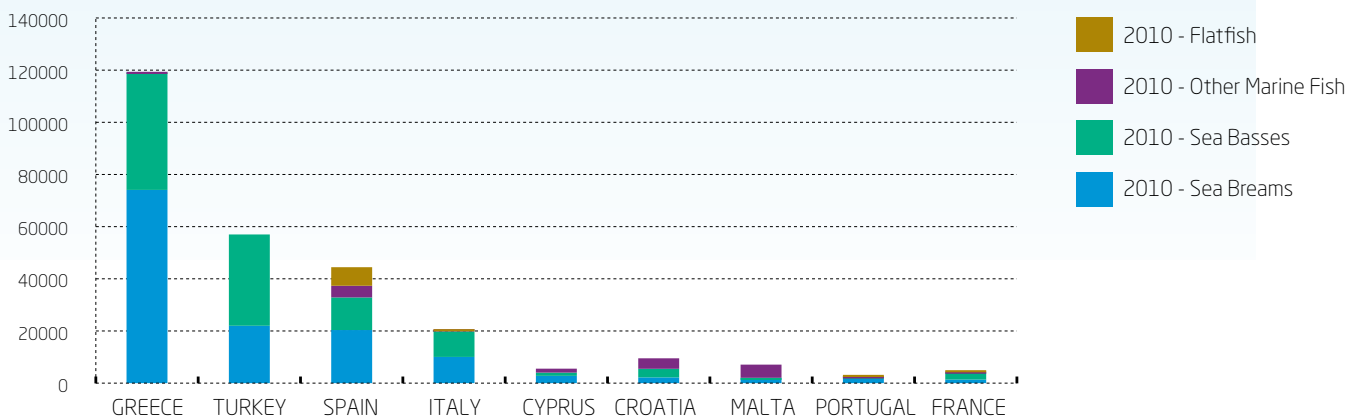
Marine Mediterranean

While termed 'Mediterranean', this component covers the coastal production of the southern European countries and incorporates a completely different range of fish species to those reared in northern waters.

Evolution of Marine Mediterranean Aquaculture Production (tons)



Mediterranean Aquaculture Production in 2010 per Country & per Species



Marine Mediterranean

Key Observations

Mediterranean aquaculture production grew substantially from 2002, peaking in 2008 but dropping back to around 272,000 tons following market disturbances (APR= 7.9% for this period).

The major species farmed are Gilthead sea bream and European sea bass, representing 50% and 41% respectively.

Greece and Turkey are the main producers of seabream and seabass, followed by Spain and Italy; warmer climates and site availability contributed to growth in these countries.

Turbot is the main flatfish farmed (8,000 tons), with several important investments made recently. The majority of turbot farmed is in the Galician Region of Spain, while smaller quantities are produced in France and in Portugal.

Tuna (included in data for other marine fish) is mainly produced in Croatia and Malta and is currently the on-growing of wild-caught juveniles. Research advances on the breeding of tuna in captivity show clear potential for future aquaculture activities.

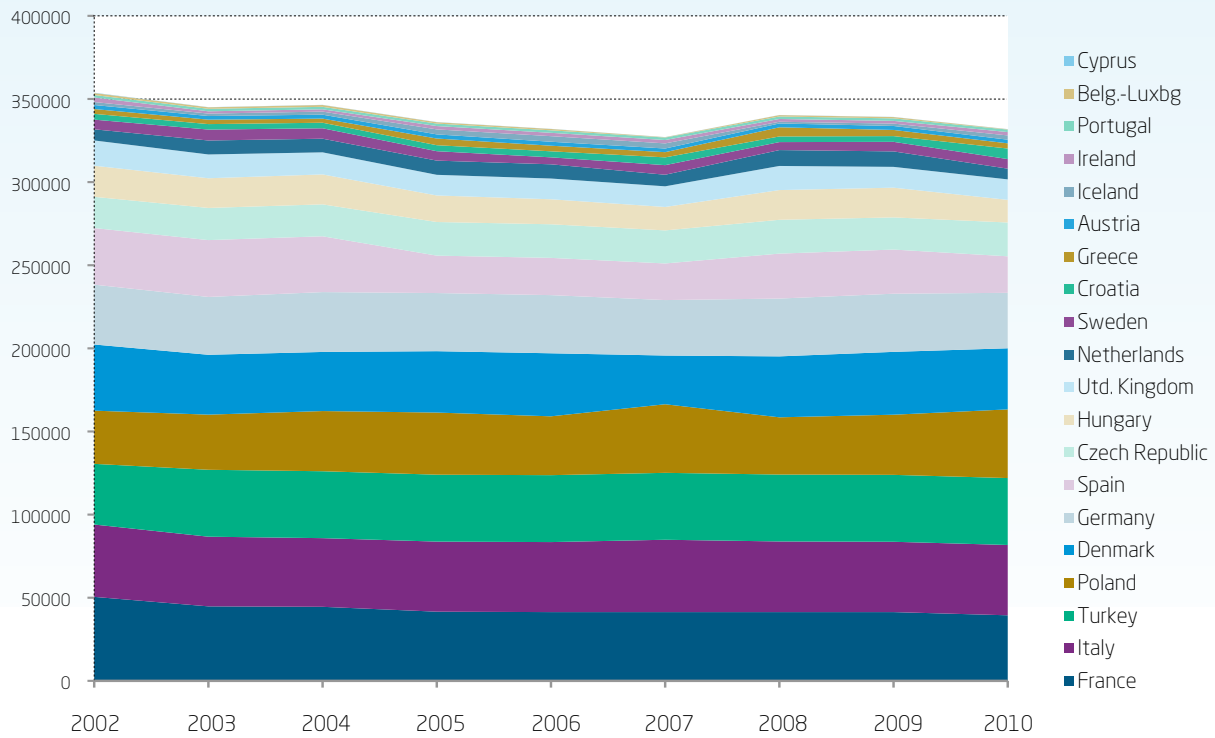
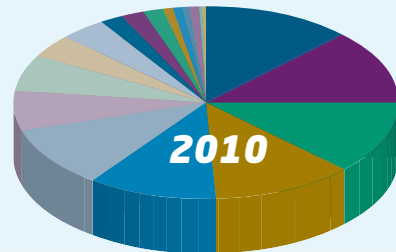
Diversification into new species - such as meagre (4,000 tons) - although seen as promising, has yet to make a significant impact on this young component of European aquaculture.

The financial crisis of 2008 had a dramatic effect on the production profile of the Mediterranean sector which led to early harvesting in Greece and Turkey, a market glut and a severe drop in prices. This led, in turn, to a drop in production in 2009 & 2010 although prices have since recovered.

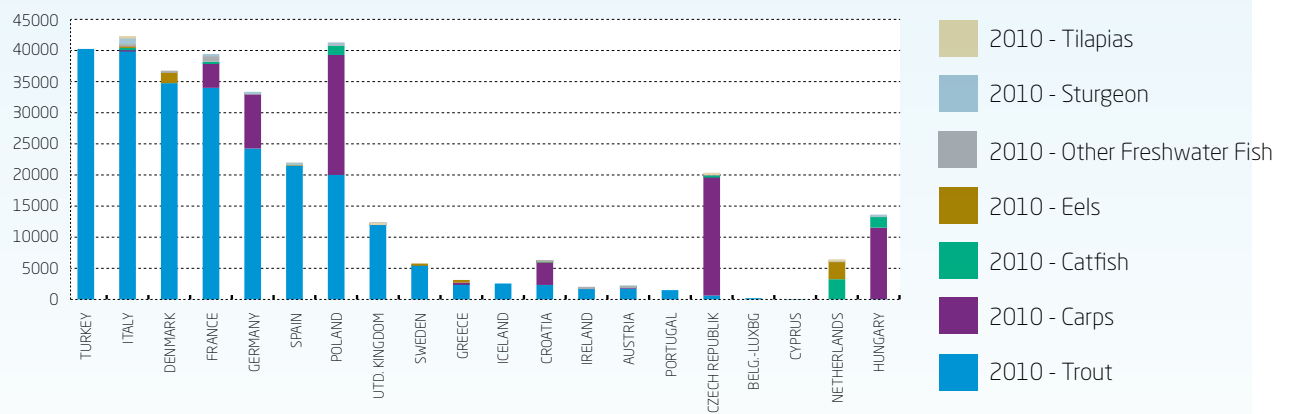
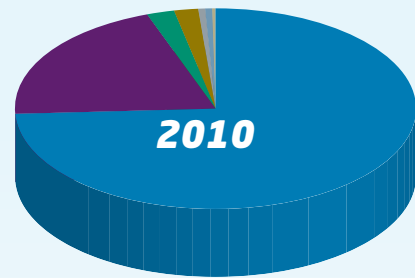
Current forecasts are that production will return to the 2008 level in the near future and that meagre, which can be grown in the same installations, will also increase.

Freshwater

Evolution of Freshwater Aquaculture Production (tons)



Freshwater Aquaculture Production in 2010 per Country & per Species



Key Observations

Freshwater aquaculture production dropped from a high of 350,000 tons in 2002 to around 330,000 tons in 2010 (APR = - 0.8%) but, compared to marine production profiles, is much more widely spread around Europe and is practised in all countries.

Production is dominated by trout (74%), followed by carps (20%).

'Trout' is mainly rainbow trout, with small production levels reported for other freshwater salmonids, namely Arctic char, brown and brook trout.

Trout is reared for 2 main products, portion size (<600g) and large size (> 1kg); the majority of the larger size are produced in brackish or sea water, acting as a competitive product to salmon; large trout are also used to produce trout roe.

The most important trout producing countries are Turkey, Italy, Denmark, France, Germany, Spain and Poland.

The major carp species is common carp, with small production of silver carp, grass carp and bighead carp.

The most important carp producers are Poland, the Czech Republic and Hungary; this sub-sector uses large ponds and extensive farming techniques. The major food

markets are seasonal (Christmas/New Year and Easter) but diversification for sport angling is also evident. There are more than 20 million recreational anglers in Europe!

Other species farmed are catfish, eels and sturgeon (for caviar) while minor species include perch and roach. There is increasing interest in the potential for pike-perch (Zander).

African catfish production remains small and stable at around 7,000 tons, mostly done in the Netherlands, Hungary and Poland but efforts to produce higher levels of the European catfish (wels) have also been engaged.

Eel production has reduced due to a combination of the availability of 'glass' eels (juveniles) and weaker markets.

The prices of trout and carp have not gone up in real terms in 40 years, putting pressure on competitiveness and product diversification actions.

Production system diversification – notably towards the use of water recycling and treatment systems (RAS) – has been promoted so as to free freshwater aquaculture from its dependence on river or spring waters. Technological advances have been remarkable but operating costs, notably for energy, can restrict development.

General Conclusion



The main fish species produced in Europe are Atlantic salmon, rainbow trout, seabream, seabass and carp which, when combined, accounted for 96% of European fish aquaculture production in 2010

Individually, Norway is the producer of the largest volume – principally salmon - reflecting its climatic and geographical advantages for the rearing of this species

Countries such as Spain, Italy, France and Turkey have the highest diversity in terms of the species produced, farming both freshwater species and marine species in significant quantities

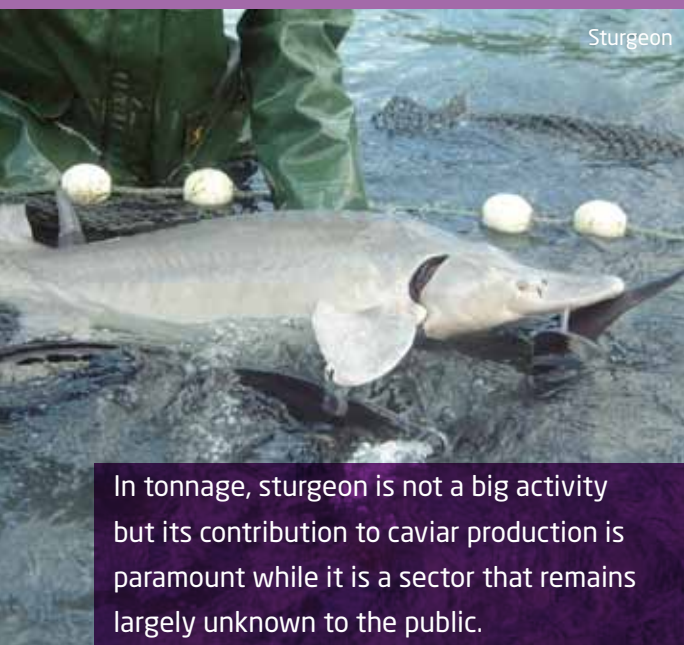
The 3-sector division of European fish farming also reflects structural differences in production – and corporate operational structure; while freshwater operations are mainly small scale, operated by SMEs or family-run, the Mediterranean has undergone considerable consolidation in recent years; salmon farming is largely corporate in structure, including several multi-national organisations.

Detailed production data can be found on the FEAP website www.feap.info

As can be seen from this brief overview, European aquaculture is far from being a simple activity and continues to evolve and change.

The following section looks at a case study on sturgeon farming and tries to answer some of the questions regularly asked about fish farming in Europe.

Sturgeon Farming for Caviar Production



In tonnage, sturgeon is not a big activity but its contribution to caviar production is paramount while it is a sector that remains largely unknown to the public.

Wild sturgeon species are protected by the Convention on International Trade in Endangered Species of wild fauna and flora (CITES) due to the effects of overfishing, meaning that most caviar now comes from aquaculture.

Recognising this situation, FEAP organised a professional workshop with the European sturgeon farmers so as to discuss the current position and progress.

- The world wild catch of sturgeon has decreased dramatically since the late 1980s to levels below 1,000 tons of fish and since sturgeon is included in CITES protection appendices, trade in caviar is restricted.
- Farming of sturgeon started in the 1990s and has significantly increased the last decade to reach a level of more than 2,500 tons of fish.

Facts & figures

Astonishingly, 11 sturgeon species are farmed in Europe, the Siberian sturgeon being the most popular. The world production of caviar from aquaculture today is 110 tons, 60% coming from Europe, followed by US/Canada, and Asia (China). Global production is expected to reach 250 tons by 2015!

European caviar production is now around 80 tons, produced by 42 producers in 12 countries (80% represented by Italy, France and Germany), with an ex-farm value of 48 M€. This production is estimated to triple by 2016.

Future challenges

- While farmed caviar production is set to increase, answers are needed for:
 - Fish health issues
 - Production aspects, particularly the avoidance of market gluts
 - Trade issues (such as VAT ratings for caviar as a luxury product)
 - CITES control measures for caviar trade were originally put in place to safeguard the wild sturgeon. However, since most caviar is now a farmed product, an updated position is required
- Misleading product labelling since substitution products are often termed 'caviar' while the term 'caviar' is officially reserved for the eggs from sturgeon and paddlefish.

Sturgeon farming for caviar production is an excellent example of how aquaculture can provide a sustainable response to an international conservation issue and produce a high quality niche product that can result in a significantly growing business, in Europe as well as worldwide.

This activity provides an interesting opportunity for the brave – investing and waiting for seven years before the first caviar appears! It seems clear that this sector will grow, perhaps slowly but surely, and continue to provide European and global markets with one of the best aquaculture products in the world.





Courtesy of Marine Harvest

Norway has a huge coastline, measuring some 25,000 km and, if one includes the fjords and islands, it extends to over 100,000 km – 2.5 times the circumference of the world!

Its coastal climate gives significant advantages for the farming of marine coldwater species, such as salmon, cod and halibut.

Why is Production in Norway still increasing but stagnating in the EU?

Another explanation is given by the 2009 European Parliament study that highlighted regulatory and legal constraints for EU aquaculture (<http://tinyurl.com/cluex8h>).

- The lack of a common approach to licensing within the EU
- Difficult access to suitable sites for aquaculture production (see "Natura 2000" topic)
- Concerns about the Water Framework Directive's potential to constrain aquaculture
- Predation of aquaculture stocks by protected bird and animal species (see 'Cormorant' topic)
- Concerns over the application of EIA (Environmental Impact Assessment) rules at the local level
- Problems of a technical nature (aquatic animal health legislation, accessibility of veterinary medicines, organic aquaculture) (see 'fish health' topic)
- International trade rules (see 'level playing field' topic)

Recommendations for all these issues have been prepared by the FEAP and presented to both the EU Commission and the European Parliament.

Norway has already addressed some of these constraints, identifying and applying solutions that have supported development; by being one of the first States to develop

a National Aquaculture Strategy for development, this provided clarity and guidelines for the profession. In addition, there is a high level of support from the Norwegian research community, which has developed a wide range of expertise and support measures.

A notable contribution is the use of a National agency, the Norwegian Seafood Export Council, for marketing and promotion activities. Funding for this is made by a levy on the values of seafood exports, both aquaculture and fisheries. A dedicated aquaculture research fund is financed in a similar manner.

Establishing a combination of clear strategies for development, appropriate planning and licensing measures, support for research and coherent marketing and promotion efforts have, without doubt, been strong reasons for the success of Norway's aquaculture development.

Why is EU Freshwater Production dropping?

Freshwater fish farming founded European aquaculture, split predominantly between traditional carp and trout production. The slow but steady regression of EU freshwater aquaculture is clear. Personified by SMEs and family businesses, freshwater aquaculture is usually a rural activity that also makes a significant contribution to sport angling, providing fish for restocking lakes and rivers, while it is difficult to be precise, given national differences, the following issues are important.



- Marketing
 - Small enterprises face difficulties to match the demands of the modern retail sector, which increasingly looks for consumer-friendly, added-value, processed products.
 - Such producers are increasingly looking for local, niche markets since the modern retail sector is now responsible for the large volume of fish and seafood sales, greater than 85% in most EU countries.
 - Expansion to Improve Competitiveness
 - It is often problematic to expand freshwater production facilities, due to physical restraints or simply because of a lack of availability of water; European States have well-established limits on the waste that an individual farm can release.
 - These limitations evidently affect productivity improvements.
 - Economic Factors
 - In line with the observations on marketing, the smaller producer is also faced with the evolving requirements for new standards and certification (see labelling and certification article) and farm management protocols, notably for fish health.
 - Investing in processing – to EU standards – remains expensive but attaining niche markets - such as organic production - and diversification activities – such as eco-tourism – can be seen as alternative means of increasing income.
 - Obtaining economies of scale, for improved competitiveness, is thus very difficult, unless such producers group with cooperative structures or producer organisations.
- Extensive pond culture provides notable environmental services, contributing to watersheds and landscape management amongst other public services. These need to be fully recognised, in line with the requisite harmonisation with Natura 2000 objectives, and represent a prime concern for this sector.
- In conclusion, freshwater fish farming, as a sector, faces many challenges and is undergoing change to meet these; it will undoubtedly use species and activity diversification as keys for development in coming years.*

FEAP'S PRIORITIES



Courtesy of Selonda

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Boost the Development of EU Aquaculture

The overarching European policy affecting aquaculture is found in the Common Fisheries Policy and its related legislative instruments:

- The Common Fisheries Policy (CFP) is primarily concerned with the management of the stocks of wild fish in European waters.
- The Common Organisation of the Markets for Fisheries and Aquaculture Products (COM) looks to assist establishment of the best conditions for the markets in Europe.
- The European Maritime and Fisheries Fund (EMFF) is the financial instrument for supporting and implementing the CFP and the COM.

In 2011, the European Commission (EC) published its proposals for CFP reform and the associate recommendations for the COM and the EMFF.

Why is aquaculture, basically a farming activity, in the Common Fisheries Policy and not the Common Agriculture Policy?

The logic for this position is because the majority of fisheries and aquaculture products are categorised as seafood and thus in the same market.

Evidently, actions on fisheries dominate the CFP but aquaculture's contributions to the European market - as well as jobs in coastal and rural areas - are increasingly recognised.

Providing high quality, safe and nutritious food is a precept for European aquaculture. While fisheries landings have dropped, aquaculture grew and developed during 30 years but encountered blocking points that held back further growth. A detailed EC strategy for the Sustainable Development of European Aquaculture was published in 2002 and revised in 2009, noting that while many of the environmental and food safety objectives set in 2002 had been achieved, the original growth objectives had not been met (4%/year).

FEAP believes that the reasons for this can be summarised as:

- Restricted access to space for aquaculture activities.
- Inadequate licensing provisions & associate red-tape.
- A lack of harmonisation within the EU so as to provide a level-playing field for aquaculture operators.
- Extreme economic sensitivity to rapidly changing markets.

The current proposals for reviewed policy and legislative reform take many of these issues into account; nonetheless, successful growth will be dependent on individual Member States adapting to the national sector's needs and applying support measures that will maintain sustainable development.

Realistic planning and well-coordinated actions are needed for successful growth while, at the same time, avoiding the potential for market disruption.

Over many years, FEAP has provided detailed advice to the EC and the European Parliament on the multi-faceted nature of the aquaculture sector, demanding that aquaculture be seen in its own right and not just as an add-on to fisheries. It is therefore with pleasure that the FEAP acknowledges the efforts of both the Commission and the European Parliament to recognise and promote the role of European aquaculture in the supply of high quality, sustainably-produced fish and shellfish to the European market.

A Level Playing Field for the Profession

*Gustavo Larrazábal · FEAP Vice-President
President-Managing Director of Grupo Tinamenor S.L.*

The key challenge for European aquaculture today is to achieve sustainable growth.

To be able to grow, we have to be profitable so as to be able to invest. Profitability is only possible if we can be competitive with imports from third countries, now accounting for more than 65% of our seafood supply.

However, European legislation, production conditions, buying practices and consumer attitudes are strangling the growth potential of aquaculture. As imported products do not always offer the same levels of technical and social guarantees, we need to transpose our strict European rules on those countries from which we import. This is what we mean by the need for a level playing field.

The following aspects highlight the conditions of the 'un - level' playing field of today:

Information for the consumer

- Unreliable or insufficient labelling
- No mention of harvest dates
- Defrosted frozen products being presented as fresh at the retail point of sale

Food Safety

- Different approaches to traceability are applied at the global level.
- Use of medicines/antibiotics/disinfectants/additives differs between EU States as well as at the global level
- 3rd country possibility to defrost several times without mention on labelling

Processing

- Some techniques (e.g. to improve freshness) are used without associate label information
- A lack of transparent information systems on traceability (e.g. HACCP)

Feed Ingredients

- 3rd countries can use raw materials that are forbidden in the EU for use in feeds

Environmental measures

- Europe has strict regulations when it comes to environmental impact assessments, water quality at the discharge of the farm and use of protected areas (cf. Natura 2000)

Animal welfare

- Third countries are not subject to the same legislative welfare regulations that exist in Europe (e.g. live transport, on-farm husbandry practices, slaughter...)

Economic issues

- Payment of direct subsidies related to production/export levels
- Non-reciprocity on tariffs with respect to bilateral trade

Working conditions

- Employment conditions, social welfare, salary levels, safety at work, training levels...are not comparable

Marketing

- Imbalance in the market value chain of aquaculture products due to the dominance of large retailers/buyers
- Lack of sufficient transparency in the value chain

In conclusion, in order for European aquaculture to achieve innovative and economic growth, we have to be competitive and profitable, which will only be possible with a well-established level playing field for the profession. It is essential that the policy makers take these issues into account in the current discussions on the reform of the CFP.

*Pier Antonio Salvador · Chairman FEAP health Commission
Owner and Manager of Azienda Agricola CAIO (Pordenone)*

Among the most important issues governing aquaculture development is the assurance of the health and welfare of farmed fish; for fish farmers this means:

- Safeguarding the best fish welfare in the farm, during live transport and applying the correct stunning and killing methods
- Access to adequate veterinary medicines while maintaining a particular focus on reducing the possibility to develop resistance to antibiotic and anti-parasitic agents.
- Assuring the sustainability of the sector (especially with regard to new and emerging diseases)
- Guaranteeing food safety and protecting consumer health
- Underlining the feasibility of diversification with novel farmed species

In 2011, the FEAP Fish Health Commission, FEAP members and fish veterinarians from different FEAP member countries have gathered practical examples of the most important issues regarding fish health that are being experienced in most of the Member States.

FEAP has many times requested that the EC should stop treating fish as terrestrial mammals and understand that farmed "fish" is not one species but many – including salmon, trout, sea bass, sea bream, carp, sturgeon, eels – and that these species evolved at different times, have different lifecycles, live in different waters, in different temperatures, have different physiological needs and are farmed in different environments. Because of these innate species differences, health and welfare indicators cannot be the same for all fish species. The results of research have given valuable data but more innovative studies are needed so as to clarify the needs of each fish species, based on scientific information.

FEAP believes that detailed Codes of Practice provide the best options to ensure good fish health and welfare and offer both the consumer and the producer a transparent and objective quality assurance system, based on an understanding of the interactions between husbandry practices and a range of welfare indicators. Such Codes of Practice also give importance to the training of personnel

directly involved with fish farming. The roles of National Professional Associations and the representatives within different EU institutions (EC, EFSA (European Food Safety Authority), EMA (European Medicines Agency)) are very important in promoting this approach.

FEAP has taken action on different EU Regulations and Directives in the past (e.g. Regulation EC 1/2005 on animal welfare during transport, Directive 2006/88/EC on fish health, Directive 2004/28/EC on veterinary medicines). FEAP will pay particular attention to new legislative proposals on animal health to assure that rules are genuinely applicable and do not create market distortions because of a non-uniform application in the Member States of the EU.

FEAP also considers that the evaluation of new health rules should be approached more holistically, including the working environment, workers' security, product safety, product quality and costs, in addition to pure fish health and welfare aspects.

At present, the attention of FEAP and its members is particularly focused on the following objectives:

- The availability of veterinary medicines to aquaculture and the planned review of the veterinary medicinal products legislation
- Farmed fish health and welfare during farming, transport, stunning and slaughter
- Uniform implementation of Directive 2006/88/EC within the EU

To achieve all this, FEAP has established collaborative relationships with DG SANCO, EFSA and the FVE (Federation of Veterinarians of Europe) so that the position of aquaculture producers can be fully understood.

FIFO – Fish in Fish out

Annual production of fishmeal and fish oil – from fisheries sources - is 5 million tons and 1 million tons respectively. An additional 1.25 million tons of fish meal and fish oil is now produced from the by-products of fish processing. Today, for aquafeed manufacture, aquaculture takes 80% of the total fish oil supply and 59% of the total fish meal supply³ (the majority of these going to marine fish and shrimp).

Aquafeeds have been seriously improved in terms of formulation, ingredient sourcing and technology, leading to very high rates of feed use efficiency. In the 1980s, the FCR⁴ was as high as 6, whereas today the most efficient feeds give a FCR of less than 1! As a comparison, in the wild, fish consume approximately 10kg for 1kg production.

A lot of focus has also been put on replacement of fish oil/meal by vegetable products and other sources. Today the use of fish meal and oil in trout and salmon diets has decreased to below 20% incorporation and is forecast to further lower to less than 10% by 2020.⁵

Explaining FIFO

The simplest approach to define FIFO is a calculation of the kg of wild fish used to produce one kg of farmed fish.

The main factors are:

- The quantity of fish meal and fish oil obtained from wild fish
- The amounts of fish meal and fish oil included in the feeds
- The feed conversion ratio measured to produce harvestable fish

However, this position excludes

- The use of excess fishmeal, which remains after feed formulation percentages
- The use of waste products recovered after processing; as the market grows for fillets; some 60% of the fish by weight is available for use

Calculations using this approach will result in a FIFO ratio of 4, since fish oil is the limiting factor.

FEAP believes that the most representative calculations follow the nutrients that are transferred into highly

nutritious, consumable products rather than a simple live weight comparison. Forage fish (used to produce fishmeal and oil) simply do not contain the same nutrient profile as, for example, salmon, trout and seabass.

This is best represented by the Dependency Ratios (DR) for marine protein and oil used compared to the nutritionally valuable protein and fat produced. This approach and calculation gives more realistic and balanced ratios, 1.2 for protein and 1.1 for oil.

Full details on this are contained in the FEAP Fact sheet on FIFO.

Building further upon this approach, one should also incorporate the issue of recovering and using waste materials, since more and more fish are filleted and processed where off cuts can be recycled into valuable protein and oil. These materials cannot be fed back to the same species but can be used in feeds for other species. Consequently, if one takes the use of these waste products into account, a 48% improvement in overall food production is obtained.

This position makes aquaculture the most efficient producer of food when compared to other livestock activities.

³ Source: International Fishmeal and Fish Oil Organisation (IFFO) www.iffo.net

⁴ Feed Conversion Ratio (FCR) = kg feed needed to produce 1kg fish

⁵ Tacon and Metian. Global overview on the use of fish meal and fish oil in industrially compounded aquafeeds. *Aquaculture* 285, 146-158

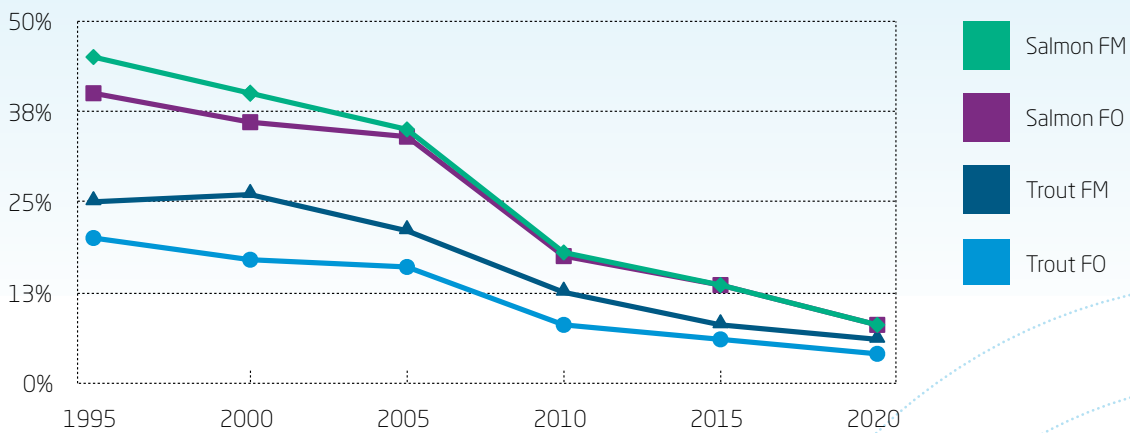


Feed volume in 1990



Feed volume in 2010

Reduced Incorporation of Fish Meal (FM) and Fish Oil (FO)



Conclusion

In the last decade major improvements have been achieved in different aspects of aquaculture management and specifically in respect of feed formulation and efficiency. Key progress has been made in identifying and using alternative raw materials for compound fish feeds and ongoing research gives optimism for further progress of this aspect.

The anticipated dependency on fish oil as a limiting factor for aquaculture development is lower than previously anticipated, while its use remains essential for guaranteeing the final nutritional quality of farmed fish.

Continued efficiency in the recovery of both proteins and oils from raw fish materials that are produced in processing makes a significant and safe contribution to this progress.

Within the recent CFP proposals for the European fisheries sector is the requirement to eliminate discards from fishing activities. The FEAP strongly supports this position and also puts forward the option that such materials that are landed and which cannot be used for human consumption should also be used so as to improve the ingredient supply sector and support the continued growth of European aquaculture.

Labelling & Certification



Labelling increasingly reflects a defined standard or protocol. For aquaculture, the first labels were to reflect quality standards – such as ‘Label Rouge’. Widespread use of geographic origin also developed – such as ‘Scottish Salmon’ or ‘Oleron oysters’. Certification – the confirmation, by audit, of the standard applied – is necessary before a label can be applied to the product.

An evident diversification of labelling has followed legislative and societal developments. The promotion of organic, eco-friendly and fish welfare concepts led to a new generation of labels, complemented by Multiple Retail Stores developing global standards (Global Gap). The FEAP supported the development of the European standards for organic aquaculture and labelling (Regulation 710/2009) so as to have clarity for this position.

One of the latest international developments has been through the Aquaculture Dialogues, administered by the World Wildlife Fund. FEAP representatives participated in those concerning salmon and trout. These dialogues have led to proposals for standards to be administered by the newly-created Aquaculture Stewardship Council (ASC).

Also, the International Standards Organisation (ISO) is looking to apply standardisation in the field of fisheries and aquaculture (ISO TC 234), including technical specifications, characterisation of aquaculture sites and maintenance of appropriate physical, chemical and biological conditions, environmental monitoring, data reporting, traceability and waste disposal. Information is available at www.iso.org.

Product labelling is one of the marketing revolutions of the last 20 years, developing with packaging and providing the support for product identification and differentiation. Food labelling is also the primary means of communication between the producer and seller of food on one hand, and the purchaser and consumer on the other.

Apart from product identification, information ranges from the place of manufacture, the ingredients, the nutritional profile and limit dates for consumption and many of these conditions are now embodied in food legislation.

Finally, both the European Commission and the European Parliament are discussing the establishment of qualitative criteria – perhaps as a European standard – for European aquaculture. It is not yet known how such an approach will develop but the FEAP provides general support for this position.

While seeing the potential for specific labelling and certification schemes, the FEAP believes that too many labels have developed and that genuine benefits should be identified. The reality is that adherence to any standard has a direct cost to the producer, not only in production/processing but also for certification and use of a label. A price-premium associated to a specific label is not only difficult to estimate but also difficult to obtain.

Labels and standards need to be promoted so that consumers can make a fair choice based on preference. However, price-quality-freshness are also prime purchase factors for fish, rather than the associated label.

Although the debate continues, labelling is here to stay.

FEAP believes that providing accurate information for the consumer is the key point that has to be respected, a condition that has to be extended through the processing and retail sectors.

Natura 2000

*Jean-Yves Colleter · FEAP Environment Commission · Chairman 'Truites de la Vallée' and
Fernando Otero Lourido · Apromar Board Member and Environmental Lawyer*

'Natura 2000' is a network of land and sea sites throughout the European Union, designed to safeguard a list of the Europe's rarest and more threatened and endangered fauna & flora species and also habitat types in accordance with the EC 'Habitats' Directive (Council Directive 92/43/EEC), and the Directive on the conservation of wild birds ("Birds Directive": Directive 2009/147/EC).

These Directives are the cornerstones of Europe's biodiversity policy. As such, species covered by these must be subject of special conservation measures concerning their habitat in order to ensure their survival and reproduction in their area of distribution.

Notwithstanding this, the Habitats and Birds Directives do not imply an automatic exclusion of any economic activities in and around Natura 2000 areas. Instead, human activities need to comply with the provisions outlined in Article 6 of the Habitats Directive, to ensure that those activities are in line with the conservation objectives of the Natura 2000 system.

In order to achieve a better implementation by Member States of EU legislation on the matter and to ensure equitability for economic operators on decisions affecting the development of aquaculture, the Commission committed itself to develop a guidance document on "aquaculture activities & Natura 2000", to facilitate knowledge and implementation of its main environmental policy instruments.

The two DGs involved in Natura 2000 issues affecting aquaculture (DG Mare and DG Environment) have been working in collaboration with representatives of the aquaculture sector, environment experts, public authorities and NGOs, via a dedicated European Commission Working Group ("N2K Working Group").

The document is made up of 6 main sections:

1. Overview of the aquaculture industry;
2. Exploration of the relationship between SEA (Strategic Environmental Assessment), EIA (Environment Impact Assessment) and other measures made under the Habitats Directive;
3. Review of the different types of impacts that aquaculture activity may have;
4. Examination of how strategic planning can create a more integrated sustainable development strategy for the aquaculture sector;
5. Focus on the provisions of Article 6.3 of the Habitats Directive, providing advice on how to carry out an appropriate assessment, and reviews the provisions of Article 6.4 HD, which allow in exceptional cases the approval of plans or projects on Natura 2000 sites;
6. Address monitoring of aquaculture activities in the context of Natura 2000.

FEAP is represented by several members of its Environment Commission and a finalised document is being prepared for publication later 2012.



The Cormorant

Ferenc Levai · Vice-Chairman FEAP Freshwater Commission
Technical Managing Director of Aranypony



Cormorants

The Great Cormorant (*Phalacrocorax carbo*) is a protected bird species and may not be hunted, captured or killed. In accordance with Article 9 of Directive 2009/147/EC. Derogation measures can be applied by Member States so as to prevent serious damage to crops, livestock, forests, fisheries and water.

The cormorant has become one of the biggest problems for freshwater fisheries and aquaculture mainly because, being a migratory bird, its predation cannot be tackled successfully at local levels. Over the past 20-25 years, the population of cormorants has increased substantially. Estimates indicated 50,000 breeding pairs in 1976 grew to an estimated 285,000 by 2006, which means 1.4 million cormorants! These put great pressure on aquaculture and natural fish stocks. Since cormorants eat 400-500 g. of fish a day, this equates to close to 200,000 tons of fish eaten each year and significant effects on natural stocks and aquaculture.

European Committees studies and projects have tried to address the issue, but with very little effect on the predatory problems. Since these involve environmental, economic, social, and other related issues, it has proven to be very difficult to tackle all aspects at once.

The latest and most important of these actions is the 'CorMan' Project - 'Sustainable Management of Cormorant Populations' - initiated and financed by the EC, and managed by representatives of Aarhus University (Denmark) and the Centre for Ecology & Hydrology (UK). 'CorMan' is responsible for developing the EU Cormorant Platform (<http://tinyurl.com/cz573be>). This includes organising pan-European counts of cormorants. A Stakeholders' Liaison Group (SLG) has been established, connecting selected European stakeholders to the project. FEAP is one of the stakeholders to be represented in the SLG which also includes European Anglers Alliance, EIFAC⁴ and Birdlife International. Ferenc Levai represents the FEAP in the SLG.

2 SLG meetings were held in 2011 and the group has successfully debated the structure and objectives of the platform, and the FAQ's regarding the cormorants and related issues. Annual meetings are planned, the following being in the spring of 2012.

FEAP'S ACTIVITIES



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Advisory Role



The main advisory role of the FEAP is to provide positions and documentation on European issues and legislative developments for consultation, using its dedicated Commissions and Working Groups. These are composed of experts from or nominated by the FEAP Member Associations. In this respect, FEAP is able to fulfil a wide range of consultative positions, including the following:

- Member of the EU Commission's Advisory Committee on Fisheries and Aquaculture (ACFA)
<http://tinyurl.com/blpe3sx>
 - › Active in the ACFA working groups on
 - Aquaculture
 - Markets
 - Issues of general interest
 - Liaison status with the Food & Agriculture Organisation of the United Nations (FAO), notably for interaction with
 - › Sub-committee on Aquaculture of the Committee on Fisheries (COFI)
 - › European Inland Fisheries Advisory Committee (EIFAC)
 - › Aquaculture Committee of the General Fisheries Commission of the Mediterranean (GFCM)
 - Memorandum of cooperation with the International Union for the Conservation of Nature (IUCN)
 - › Preparation of Guides for the Sustainable Development of Aquaculture
 - Active participant in European initiatives or projects of interest to the European fish farming sector
 - › The organisation of 9 Regional workshops to demonstrate how European RTD projects respond to policy within the European Aquaculture and Fisheries sectors – PROFET POLICY - a project supported by the European Commission – see www.profetpolicy.info (Finished June 2009)
 - › 'Finefish' – a European collective research project on 'Improving the sustainability of European Aquaculture by the control of malformations' – see www.finefish.info
 - › 'Aquamax' – a European Integrated Project directed at developing sustainable aquafeeds to maximise the health benefits of farmed fish for consumers – see www.aquamaxip.eu
 - › 'Wave' and 'Valla' – EC 'Leonardo da Vinci' projects on the valorisation of professional competence through lifelong learning
- Full details are in the FEAP website
www.feap.info

Research and Innovation

FEAP is active in both promoting and participating in research projects that will contribute to innovation and development of the European fish farming sector. In the last decade, FEAP has participated in more than 20 projects relating to cooperative research (involving SMEs), training and skill development, communication and dissemination actions and networked workshops. Full details of these are available on the FEAP website.

In order to reinforce the research and innovation processes that are required within a modern and developing Europe, FEAP supported the development of the European Aquaculture Technology and Innovation Platform – EATIP – a multi-stakeholder organisation with members drawn from the European aquaculture value chain.

FEAP is a founder member of this Technology Platform and provides the Secretariat that coordinates EATIP activities.

A statutory goal of the EATIP is to develop measures and structures that will improve the research, development and innovation conditions so as to support the sustainable development of European aquaculture. The activities of EATIP are thus to provide the foundations for technical and economic excellence which will be the basis of the leadership potential of European aquaculture at the global level.

3 major outputs are being prepared that will represent the views and priorities of EATIP.

- **Defining a long term Vision for European Aquaculture 2030** *a positive, sustainable, future scenario reflecting the ideals, values and the aspirations of the stakeholders.*
- **Developing a Strategic Research and Innovation Agenda (SRIA) for European aquaculture for the coming two decades** *a dynamic strategy to achieve the vision and meet the innovation challenges*
- **Implementing an approved Plan of Action** *a strategic action plan describing the research, training, education and dissemination requirements needed to fulfil the SRIA and the Vision.*



Through the 'Aquainnova' EU FP7 project, EATIP is coordinating the preparation and consultation of a range of Vision documents and SRIA proposals for the different Thematic Areas that comprise the value-chain of European aquaculture, namely:

1. Product quality & human safety and health
2. Technology and systems
3. Managing the biological lifecycle
4. Sustainable feed production
5. Integration with the environment
6. Aquatic animal health and welfare
7. Knowledge management
8. Socio-Economics and Management

The complete documents, accompanied by EATIP's consensus view on European aquaculture's development, will be published in 2012. These positions will provide a comprehensive position on how European aquaculture can develop during the next 20 years. Although forecasting is always a risky business, the combination of recognised expertise – drawn from industry, research, representative and administrative sectors – with widespread consultation actions provide a valuable base for progress.

FEAP fully supports the concept of creating the conditions for the effective management of knowledge – a key for both technology transfer and skill development – by identifying the needs, challenges and methodologies for knowledge application and use.

The EATIP vision of European aquaculture in 2030 will be published soon, with prioritised research axes and action plans on how to achieve the objectives identified.

More information can be found on EATIP's website – www.eatip.eu

The FEAP Award for Excellence



Supported by MSD Animal Health, FEAP makes an annual award to individuals who have made outstanding contributions to excellence in European aquaculture.



FEAP president Arnault Chaperon, Bjørn Myrseth, Robin Wardle (MSD)

The award was presented during the FEAP Presidents' Meeting, held in Rhodes on 17-18 October 2011, and was decided by a jury composed of the previous recipients of the Award, following nomination by a FEAP Member Association.

Presented jointly by the FEAP President, Arnault Chaperon and Robin Wardle, Director of Technical Services and Customer Support for MSD Aquatic Animal Health, Bjørn Myrseth was recognised for his long-standing contributions to European aquaculture.

Bjørn Myrseth has had an exceptional career, being active on many fronts since he graduated with a Master's Degree from the University of Bergen in 1971. Almost immediately, he became a founder of Stolt Sea Farm, which was specialised in the production of salmon smolts first in Norway, then in Scotland, USA and Canada. Later, market size Atlantic salmon was produced and Bjørn Myrseth was the key driver of the company's involvement in sturgeon farming in California. He then looked to diversify his interests and, through Marine Farms AS where he was CEO, made investments in Greece, UK and Chile. Marine Farms was listed on the Oslo Stock Exchange in 2006, having operations in the UK (salmon), Belize (cobia), Vietnam (cobia) and in Spain (seabass and seabream).

He has been a long-time supporter of cooperation and openness in developing aquaculture and, already in 1976, was a co-founder of the European Mariculture Society – the precursor of the European Aquaculture Society (EAS). While active in founding regional and national aquaculture associations in Norway, he was elected President of EAS in 1992.

It is this combination of personal interest in discovering developments and applying innovation in marine aquaculture that have driven his professional career and has meant that his expertise, experience and insight are regularly sought by many. Due to Bjørn's long tenure and active involvement in the development of aquaculture, he is considered to be one of the pioneers of the modern fish farming industry. In receiving his award, Bjørn said that he was slightly surprised to receive an award for just doing his job, noting that he was not yet finished!

Participation & Promotion

As aquaculture develops, FEAP is increasingly involved in sectoral discussions on aquaculture as well as broader issues that affect the profession.

In 2011, FEAP representatives participated in

- EU Presidency, Commission and Parliament meetings and workshops on aquaculture's position in the CFP
- European Commission conferences on developing the Bioeconomy, following participation in the BECOTEPS FP7 project
- Aquaculture dialogues on salmon and trout, organised by the WWF
- Climate change – effects on aquaculture, notably through the CLAMER FP7 project and the Port-Cros symposium, organised by the TOTAL Foundation
- 'Aquaculture Europe 2011', the principle conference on European Aquaculture, and several national aquaculture events
- A Nordic aquaculture conference on developments in the Baltic Region, which led to the "Helsinki declaration"
- 'Marelife', an innovation symposium held within the North Atlantic Seafood Forum (Oslo)





Strategy

Strategy

plan or method

achieve a goal or

The Future: what brings 2012?

2012 will provide key points of interest for the aquaculture profession as the European Council, Parliament and Member States respond to the Commission's proposals for the CFP, the COM and the EMFF. This will give clarity to the public strategies and policies for European aquaculture in the next decade.

EATiP will finalise its own Vision and Strategies for research during the year and will provide a challenging, interesting and solid base for industry-driven research programmes.

The Annual General Meeting of FEAP will be held in Inverness (Scotland) on May 25-26, hosted by the Scottish Salmon Producers' Organisation and the British Trout Association and will provide the positions for FEAP's future work.

FEAP will organise its autumn Presidents' meeting in Brussels.

FEAP's consultation efforts will thus focus on

- A well-defined position for the role of aquaculture within CFP reform and related proposals
- Equitable legislation to establish the level-playing field for aquaculture in Europe
- Improved understanding of how professional aquaculture can develop alongside Natura 2000 and environmental legislation
- Extending the availability of adequate veterinary medicines and vaccines for best fish health and welfare
- Advancing better communication and promotion activities within the European aquaculture profession

Contact us

The FEAP Secretariat:

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The office holders of FEAP are:

- Arnault Chaperon (France): President
- Paul Birger Torgnes (Norway): Vice president - Responsible for External Relations
- Gustavo Larrazábal (Spain): Vice president - Responsible for Knowledge/Research
- Marco Gilmozzi (Italy): Vice president - Responsible for Finance
- Ragnar Joensen (Faroe Islands): Vice president - Responsible for Communication
- John Stephanis (Greece): Past president - Responsible for Communication

National Member Associations:

BELGIUM	Union Professionnelle des Pisciculteurs Belges
CROATIA	Croatian Chamber of Economy – Aquaculture Unit
CYPRUS	Cyprus Mariculture Association
CZECH REPUBLIC	Rybarske Sdruzeni Ceske Republiky
DENMARK	Dansk Akvakultur
FAROE ISLANDS	Faroese Fish Farmers
FINLAND	Suomen Kalankasvattajaliitto
FINLAND	Ålands Fiskodlarförening
FRANCE	Fédération Française d'Aquaculture
GERMANY	Verband der Deutschen Binnenfischerei
GREECE	Federation of Greek Maricultures
HUNGARY	Hungarian Fish Farmers Association
ICELAND	Icelandic Aquaculture Association
IRELAND	Irish Salmon Growers Association
ITALY	Associazione Piscicoltori Italiani
LITHUANIA	Akvakultūros produkto uždamosios recirkuliacinės sistemos gamintojų asociacija
MALTA	Federation of Maltese Aquaculture Producers
NETHERLANDS	Nederlandse Vereniging van viswerkers
NORWAY	Norwegian Seafood Federation
POLAND	Stowarzyszenie Producentów Ryb Lososiowatych
PORTUGAL	Associação de Aquaculturas de Portugal
SPAIN	Asociación Empresarial de Productores de Cultivos Marinos
SPAIN	Organización de Productores de Acuicultura Continental
UNITED KINGDOM	Scottish Salmon Producers Organisation
UNITED KINGDOM	Shetland Aquaculture
UNITED KINGDOM	British Trout Association



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