



FEDERATION OF
EUROPEAN
AQUACULTURE
PRODUCERS

ANNUAL REPORT

2014

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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

- **>2 million tons of produce**
- **Ex-farm value of over € 8 billion**
- **100,000 direct jobs in coastal & rural areas**

FEAP works to support and promote the responsible development of the European aquaculture sector and, through a range of diversified actions, develops and provides the common positions and opinions of the European sector.

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

- | | |
|------------|------------|
| • Trout | • Seabream |
| • Salmon | • Turbot |
| • Carp | • Cod |
| • Sea bass | • Sturgeon |
| • Catfish | • Meagre |

European aquaculture rears many other species, both in fresh and salt water, and details on the levels of production reported can be found in '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 aquaculture and, in line with society's expectations, provides transparent information on activities and developments in this dynamic sector.

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

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 and interests.
- Provide accurate information and sound rationale to policy and 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 start of 2014 heralded a new era for European aquaculture with it being recognised as a key pillar of the Common Fisheries Policy (CFP), whose reform was approved in December 2013. With a focus on sustainable practices, significant efforts to support the growth and development of European aquaculture are foreseen within the CFP, using the structural measures that are included within the new Common Organisation of the Markets for Fisheries and Aquaculture Products and the financial support accorded in the European Maritime and Fisheries Fund. At the same time, the Research and Innovation Framework Programme Horizon 2020 has also been launched, giving new opportunities for European research to provide new developments and solutions that are needed for successful innovation within the sector. Aquaculture is also seen as being integral to the 'Blue Growth' strategy of Europe.

This Report includes the most actual updated figures for European fish farming, including estimates up to 2013, providing a comprehensive overview of the sector and the issues affecting its development.

One of the highlights of this year was FEAP's 'Dublin Declaration'. Within the framework of celebrating European Maritime Day 2013, the Irish Minister for Agriculture, Food and the Marine, Mr Simon Coveney TD, officially witnessed a Declaration on 'Streaming Sustainability in Aquaculture'. FEAP launched a wide set of principles, using 5 core values, so as to ensure the future of European aquaculture, both marine and freshwater, and support its handover to the next generation of producers. This Report includes interviews with aquaculture newcomers that reinforce these values and their scope.

These principles cover the position of the aquaculture profession towards water resources, science, the environment, economics and consumers, and give central policy objectives for the industry and its representatives in its actions and communications with consumers, regulators and investors. For the second time, FEAP organised 'Aquaculture in Motion' taking a close view of the 'Strategic Guidelines for the Sustainable Development of European Aquaculture' that were published by the European Commission in April 2013. These Guidelines aim to assist the EU Member States to define national targets while taking account of their individual circumstances, institutional arrangements and relative positions in terms of aquaculture activities and their development.

The 2014 Annual Report highlights a range of technical, legislative and strategic topics – each affecting how European fish farming can develop in the most sustainable way, including economic, environmental and economic considerations. Aquaculture is a complex activity, achieved throughout Europe and the world but FEAP understands that aquaculture needs to be better understood and supports sectoral transparency to achieve this objective.

FEAP continues to work on advances for the profession, achieving these by working with the profession, the policy-makers and other stakeholders so as to assure the sustainable development of European aquaculture.

Message from Struan Stevenson, MEP Fisheries Committee



A well known political activist and campaigner of many years' standing, Struan has represented Scotland in the European Parliament since 1999. Struan has a keen interest in the environment and fisheries. He is Senior Vice President of the European Parliament Fisheries Committee and in October 2011 he was appointed as rapporteur or draftsman on one of the three main legislative reports of the Common Fisheries Policy (CFP) reform package. The report covers a European Commission proposal for a regulation on the common organisation of the markets in fishery and aquaculture products. In recognition of his work on fisheries and his efforts on CFP reform, Struan was named "MEP of the Year" in the Fisheries category of the Parliament Magazine MEP Awards in both 2011 and 2012.

"There is huge growth potential for EU aquaculture, which can help spare overexploited marine resources. It can also boost employment in coastal and inland areas."

What raised your first interest in aquaculture??

10% of seafood consumption in the EU comes from aquaculture, 25% from EU catches and 65% from imports from third countries (both capture fisheries and aquaculture). Aquaculture can fill this gap to make us less reliant on imports and put less pressure on wild fisheries.

We have the world's best aquaculture science, cutting-edge technology, the perfect climate and coastal conditions for fish farming

This sector has huge growth potential and the EU is lagging behind. We have the world's best aquaculture science, cutting-edge technology, the perfect climate and coastal conditions for fish farming and yet we have allowed countries like Vietnam, Chile and Bangladesh to overtake us. We must reclaim our global position and I have fought hard to ensure that aquaculture plays a central role in the newly reformed Common Fisheries Policy and has a fair share of the European Maritime and Fisheries Fund (EMFF).

Also, as the rapporteur on legislative report on the Common Organisation of the Markets in fisheries & Aquaculture Products (COM), I have called on the Commission to create a new EU Eco-Label. This will enable all producers of fisheries and aquaculture products from inside and outside the EU to pay for a quality assessment that will enable them to display the European flag on their merchandise. Even companies in countries like Vietnam will be able to apply for this eco-label, but in doing so they will have to meet the exact same conditions as companies inside the EU, thus achieving the level-playing field that we have sought for so long. I hope the public will quickly come to recognize and seek out the EU eco-label as a symbol of best practice and sustainability.

How did the trilogue discussions on the reform of the CFP, the COM and the EMFF go?

As the rapporteur on the Common Market Organisation (CMO) report, I led the trilogue negotiations from the Parliament side. The Council and the Parliament were in agreement over a lot of the main issues. The biggest sticking point was the article on labelling. The Commission wanted to retain their proposed date of catch whereas the Parliament and the Council were against. In the end, we decided not to display either the date of catch or the date of landing, as we felt these dates could actually provide the consumer with misleading information. Overall, we now have a sound Regulation, which will benefit producer organisations and consumers. We ended up with many thousands of votes in Committee on the CFP Basic regulation and the CMO, but we achieved a remarkable reform, wresting control away from the micro-managers in Brussels and handing day-to-day management of fisheries back to the Member States. We also introduced a phased in ban on discards, so we achieved what many people said at the outset would be impossible! I am very pleased to have been part of this major reform process and to have ensured aquaculture maintained a central role throughout the five years of debate and negotiations..

How do you see the EMFF best contributing to the development of European aquaculture?

The provisions being applied to aquaculture through the EMFF will help develop a more competitive, environmentally sustainable sector, which delivers value for money and has a clear market focus. Investment in aquaculture must not be subsidy driven and the recent reforms will help prevent that. Money could be used for new aquaculture sites, investment in human capital, skills and innovation, help for start-ups and diversification..

What do you think that the multi-annual plans will contribute?

Multi-annual plans under the new CFP will now include the target of fishing at above maximum sustainable yield (MSY) and a deadline for achieving this target. They will also contain the landing obligation and safeguards where action is needed or specific technical measures. This has been a major source of inter-institutional disputes between the Parliament, the Commission and the Council, with several fisheries multi-annual plans blocked at First Reading by the Council based on legal arguments over "who does what" in our respective interpretations of the terms of the Lisbon Treaty. This, of course, is a source of huge frustration for the sector, which desperately requires multi-annual plans as management tools to provide stability for long-term investment decisions.

To try to resolve this dispute I am currently leading a Task Force, composed of representatives from the three institutions, to tackle the issues of delegation of responsibility under co-decision. We have made significant progress, especially on the single stocks and will continue to work hard on dual-species and multi-species stocks before the end of the mandate. Multi-annual plans will be one of the most important instruments in the new reformed CFP as they will set the measures on how to restore the fish stocks to sustainable levels and maintain them, ensuring long-term sustainable fishing and bringing stability to the fisheries sector..

What are your hopes for EU aquaculture?

There is huge growth potential for EU aquaculture, which can help spare overexploited marine resources. It can also boost employment in coastal and inland areas. Compared to other parts of the world such as Vietnam and South America, the EU aquaculture industry is stagnating due to increased red tape and a slow authorisation procedure. Many licenses take up to three years to grant which dissuades investors from investing. This increases start-up costs which are in turn, added to the production costs. EU aquaculture farmers cannot compete with low prices from third countries. There is also the problem of competing with other organisations or authorities for space. However, the OECD and the FAO both estimate that aquaculture will, by 2015, overtake supply from capture fisheries to account for more than half of the fish and seafood produced for human consumption. Aquaculture is therefore seen as an important factor in ensuring a sustainable global food supply and overcoming food insecurity. I hope that our reforms of the CFP will catapult EU fish farming back into the position of global leader..

We understand that you are not standing for the European Parliament anymore. Are you going to maintain an 'aquaculture' interest in the future?

I have spent the past 15 years as an MEP and during all of that time I served on the Fisheries Committee, spending 3 years as President and the past 5 years as Senior Vice-President. I have visited fish farms, processing factories, scientific laboratories, and research institutes around the world and I have lectured on aquaculture from Hanoi to Buenos Aires. I remember once a headline in a Chilean newspaper, which said I was "Chief of the EU Aquaculture Mafia come to Chile to steal their salmon secrets!" I think that was rather an exaggeration, but nevertheless I have always had a profound interest in aquaculture, based on the fact that the sector provides over 6,000 good jobs in my own political constituency of Scotland, where we produce some of the best farmed salmon in the world. I will, of course, continue to maintain my interest in and connection with the aquaculture industry.

Message from Yvette White, recipient of the 2013 FEAP Award for Excellence in European Aquaculture



I discovered aquaculture through my language skills, more or less by accident, when in the United Kingdom in 1978. I had no idea then what impact this was going to have on my life! I quickly became part of the team which started one of the main French marine hatcheries on the island of Oléron in 1979. The next decade was both full of hopes and frustrations, as always in new ventures. In the nineties, I became more and more involved with the governance of the sector to finally end up handling the two French producer associations that cover marine and continental fish farming as well as the inter-branch organisation with its three colleges: production, processing and feed manufacturers. For the last twenty years, I have also been involved with FEAP which, in 1993, was still the European Federation of Salmon and Trout Growers (FES).

In the early nineties, the Mediterranean marine fish farming sector was new and developing rapidly. We were starting to feel the need to be represented at the European level, and we started procedures to create a new European association, as we thought that if we joined the FES which had already been in place for over 20 years to represent the salmon and trout sectors, we would be drowned under the weight of the salmonid sector.

To be strong and receive the attention it deserves, the sector must be united and talk with one voice.

In the end, we did not create a new association and we joined the FES, which then became the FEAP. Looking back on it, this was the best thing we could have done. To be strong and receive the attention it deserves, the sector must be united and talk with one voice. This is what we have done ever since, even if sometimes it has not been easy. Pond farming and trout farming, marine and continental fish farming, salmon and trout, big companies and small ones, open circuits and recycling, ... the list is long of differences between us, but if we look at the quality of our products, the sustainability of our processes, the problems we have with imports from third countries and the lack of a level playing field, the unfair negative image too often promoted by NGOs and the media, the stifling legislation, the difficulty to get noticed, our eagerness to move forward and so on, we quickly realise that we all face the same problems and that our unity is our strength!

In the eighties, aquaculture was considered to be the solution for feeding the planet. Europe with its important R&D was looking very positively on the development of the sector. As a bunch of young fish farmers, we were very optimistic! In the right place at the right time! Yet, thirty years later, Europe now imports more than 65% of its seafood needs and has become heavily dependent on imports. We have the incongruous characteristic that 2/3 of the seafood products consumed by the Europeans do not need to fulfil the same standards as those imposed on European production!

Previous Recipients of the FEAP Award for Excellence in European Aquaculture

Baron Charles de Fierlant Dormer (Belgium) Tore Håstein (Norway)
Jean-Jacques Sabaut (France) Randolph Richards (UK)
Constantin Vamvakas (Greece) Bjorn Myrseth (Norway)



After decades of having to withstand ever-increasing red tape and legislation, more often than not in contradiction between them, the sector is at its wits end. The European Commission now seems to be aware of the blockages that prevent the sector from growing and developing further. As part of the EMFF, it has requested from all Member States a strategic plan for the development of aquaculture, for which it has elaborated important strategic guidelines. Will Europe be able to adapt its legislation to make this development possible? And will all the countries have the political will to put in place such a plan?

Take my country, France, as an example. Amazingly, in the last thirty years there has been no development of aquaculture in spite of the size of the country, its 5 000 km of coast and the fact it has the second maritime area in the world! France imports more than 80% of its seafood products!

For the last 15 years, the fish farming sector has been fully engaged in a sustainable approach.

Yet, for the last fifteen years, the fish farming sector has been fully engaged in a sustainable approach. The sector has been organised for many years as the French Federation of Aquaculture was created in 1924, but the creation of an inter-branch grouping the producers, processors and feed manufacturers, has reinforced the capacity of the sector to move forward: traceability of the products, quality schemes, transparency, environment, animal health, every subject was tackled and worked upon. This eagerness of the sector for improvement has created respect both from the administration and the consumers but, nevertheless, it has not made it any easier to develop and increase the production sufficiently to diminish the dependency of France on imports. In fact, fish farming production in France has decreased.

For too long, the fish farming sector was so small that it was completely forgotten in the making of new legislation, leading to some absurdities.

For example, how to have ecological continuity (Water Framework Directive) and at the same time respect the barriers needed to safeguard production areas from the spread of some diseases (Health legislation), how to respect animal welfare laws as regards transport (give the animals some food and water during transportation) when we know that feeding fish during transport can be fatal! How to accept that protection of an endangered species can eventually lead to the destruction of many others, if there is no way of lifting the protection once it has fulfilled its goal! The cormorant, probably the best example, is largely responsible for the decline of pond farming and the decimation of fish in our rivers.

Yet, when our sector is involved in the making of a new legislation from the start, it can be taken into account and the legislation can be more in line with the reality. The co-construction of the Aquatic Animal Health Directive 2006/88/CE with the European commission was for me one of the positive examples of such constructive work, and it was also a very instructive piece of work amongst the FEAP members, even though we did not all have the same requirements. We had to sit round the table and find a consensus on what could be acceptable for all.

This is how Europe should go on, not through antagonisms which destroy some for the sake of others. FEAP is able to do this.

After 35 years in aquaculture, do I see the glass half full or half empty? To be honest, I am not sure although I would love to see that all the energy spent in defending, promoting and developing our sector will lead to our European products playing a much bigger part in the diet of the European consumer. I hope I can look forward to seeing this accomplished, but I feel that the new EMFF plan is the last opportunity to provide the European sector with a sustainable future, for the good of the consumer, employment, economy in rural areas and the sector itself. FEAP will be able to make an important contribution.

Response from Arnault Chaperon, FEAP President

Yvette, we thank you for this testimony. Is there a better observation position of European Aquaculture than 35 years of a very busy career in European aquaculture, both in the private sector and in the service of our Federations? Your career and your commitment have also been recognised through the FEAP Award for Excellence that was presented to you at the last FEAP Presidents' meeting.

The picture is clear, in the past 30 years, Europe has missed out on the development of aquaculture. It is a reality that shows the signs of failure, the absurdities and contradictions of all actors responsible for the development of our industry. Let us draw conclusions and remain focused on the opportunities for the future.

Europe now really seems to want our industry to develop in order to provide consumers with healthy and quality products that could eventually reduce the European trade deficit and, at the same time, create and maintain valuable jobs in remote areas.

Our officials and elected representatives seem to have understood that there can only be growth in our sector when clear rules exist and that producers can compete with imported products under the conditions of a Level Playing Field.

All Member States must produce their own, we hope ambitious, 'Strategic Plan for the Development of Aquaculture' and we repeated this message as the central theme during the 'Aquaculture in Motion' meeting organised by the FEAP last November.

FEAP has become more mature and will accompany and monitor these new directions but will not agree with soft consensus or sterile non-decisions. We are determined to fully ensure our role as a genuine European Federation, speaking with one voice in the Aquaculture Advisory Council that is being created.

European leaders, politicians, European and national administrations, producers, processors, NGOs, consumers, we all are responsible for the future development of our sector.

Dear Yvette, it is with these intentions that we hope to show you in a few years that 2014 was indeed a turning point for European Aquaculture.

FEAP Award for Excellence in European Aquaculture



During the Presidents' meeting of FEAP on 5th November 2013 in Brussels, Yvette White received the 2013 FEAP Award for Excellence in European Aquaculture. The award was presented during the gala dinner after the FEAP Presidents' meeting, and was decided by a jury composed of the previous recipients of the Award, following nomination by a FEAP Member Association.

In a joint presentation by the FEAP President, Arnault Chaperon and Prof. Constantin Vamvakas, who received the award in 2007, Yvette White was recognised for her continuous and energetic contributions to European aquaculture.

FEAP member Associations in the picture

Scottish Salmon Producers' Organisation (SSPO) - www.scottishsalmon.co.uk

In Scotland, finfish aquaculture is dominated by Atlantic farmed salmon production. The industry is a mix of large multi-national companies and small independent producers with SSPO membership that represent virtually all farmed salmon production in Scotland.

The organisation has three key roles, to represent members politically at national and international levels, provide communication and media services, and offer technical support and co-ordinate research on an industry-wide basis.

SSPO has supported industry throughout the implementation of the 2013 Aquaculture and Fisheries Bill, lobbying the Scottish Government through editorials and social media channels such as the 'Proud to Farm Scottish salmon' Twitter and Facebook accounts so as to communicate key messages and highlight the benefits and the economic impact of salmon farming to Scotland.

The SSPO collaborates with other organisations on projects such as the Maximising Opportunities for Scottish Seafood in Asia, which looks at ways to showcase and educate key influencers about Scottish seafood. These collaborations have led to the sponsorship of the World Association of Chefs who promote the use of Scottish seafood in world-wide events and competitions.

SSPO also sponsors Scottish Swimming's "Just Add Water" campaign which promotes health and exercise through swimming, and the "Seafood in Schools Project" to educate children, their teachers and carers about the health benefits associated with eating seafood from our shores. The SSPO also provides industry representation at the Seafood Expo Global (Brussels) and at Seafood Expo North America (Boston) each year.



The Polish Trout Breeders' Association (PTBA) - www.sprl.pl

Aquaculture in Poland, in terms of volume, is based on two major species: rainbow trout and carp (annual production is about 17 thousand tonnes for each species) using two different production systems: intensive and extensive. The scope of PTBA's interest entails the sector of intensive aquaculture in Poland, which also includes sturgeon and catfish farming as examples. Established in 2007, PTBA represents over 90% of Polish salmonid production.

All the activities performed by Polish Trout Breeders Association are aimed at creating space for intensive aquaculture development in Poland. The potential of it has been analysed and a clear vision of the sector's future has been described in a document "Strategy of sustainable intensive aquaculture development in Poland by 2020". All the below mentioned activities lie within the goals set by the Strategy.

The first role of the association is to be a partner for regional and national administration as well as representing Polish intensive aquaculture sector in international fora, such as that provided by the FEAP. These will lead to the elimination of legislative constraints and create tools to boost aquaculture potential. Lobbying for EU funds for investments in aquaculture is one of the possible leads for this policy.

Creating space for fish farms includes also developing market space for their products. PTBA has made, over four years, a professional promotion campaign financed with support from EU funding. The project "Now Trout!" is aimed at increasing national trout consumption. PTBA also takes an active part in national and international R&D projects working on overcoming technological barriers of intensive aquaculture production, such as 'SustainAqua' or 'AquaBest'.

Finally, the PTBA's role is also to create a forum for fish farmers to acquire the newest and up-to-date knowledge, exchange their experiences and discuss matters important for the whole sector. Except for everyday communication via webpages and mailing, PTBA is the organiser of the annual Polish trout producer's conference. We will go further with the idea by organising a first international trout producers' conference to be held in October 2014.



'Aquaculture in Motion' the annual FEAP event



'AQUACULTURE IN MOTION', the second edition of FEAP's annual European aquaculture event, was organised in Brussels, 6th November 2013.

More than 100 participants from 20 different European countries attended this important event in the Brussels Méridien Hotel.

This year's 'Aquaculture in Motion' took a close view of the 'Strategic Guidelines for the Sustainable Development of European Aquaculture' that were published by the European Commission in April 2013. These Guidelines aim to assist the EU Member States to define national targets while taking account of their individual circumstances, institutional arrangements and relative positions in terms of aquaculture activities and their development.

4 priority areas have been identified for attention, being

1. Simplification of administrative procedures for operating licences for aquaculture enterprises
2. Application of coordinated spatial planning for sustainable development and growth
3. Enhancing the competitiveness of EU aquaculture
4. Promoting a level playing field for EU operators

Specific targets for each priority area have been identified in the Guidelines, being for EU Member States, the European Commission and for the new Aquaculture Advisory Council, proposed within the reformed Common Fisheries Policy. These targets are to be integrated into the multi-annual plans foreseen.

The meeting was opened by the FEAP President, Mr Arnault Chaperon, who said that, after years of debate on European aquaculture, it is now time to move forward, answer questions, develop solutions and take decisions.

'Aquaculture in Motion' the annual FEAP event

Examples of how National authorities are addressing the preparation of the multi-annual plans were given by

- 1. France:** A joint presentation by Mrs. Yvette White, representing the French aquaculture producers and Mr. Nadou Cadic, presently in charge of the elaboration of the French strategic plans.
- 2. Hungary:** Mr. Tamás Bardócz, head of the department of Forestry, Fishery and hunting in the Hungarian Ministry of rural development and responsible for all fisheries and aquaculture related national strategies.
- 3. Spain:** Mr. Javier Remiro Perlado, managing director of OESA (Spanish Aquaculture Observatory), and managing the development of the strategic plan for the Spanish aquaculture sector.
- 4. Germany:** Mr. Bernhard Feneis, President of the Association of German freshwater fishermen and fish producers, working closely with the German policy makers.

After the presentations, a lively and open debate drew feedback from the audience, including policy makers, producers and interest groups.

FEAP representatives also presented their positions on how they see the professional aquaculture sector structuring for implementation of the guidelines and multi-annual plans, referring to

- Indicators for a level playing field for European producers
- Research needs for enhanced competitiveness of the sector
- Progress on the creation of the Aquaculture Advisory Council

In conclusion, Mr. Richie Flynn elaborated on the key performance indicators of progress; these need to be clearly defined and measurable, allowing the success of national plans to be followed and make European aquaculture a visible success.

The goal for Europe should be sustainable self-sufficiency in seafood, creating jobs, coastal and rural economic prosperity and providing a guarantee of food quality and safety for the European consumer.



FEAP presented its recommendations on how to move European Aquaculture forward. To achieve a recognised sustainable European aquaculture sector, each player has to assume its responsibilities and at different levels - European, national, the producer, the researcher and NGOs.

Even though national plans are the responsibility of each Member State, Europe should remain responsible for assuring the level playing field, clear and accurate information for the consumers, communication and promotion of EU aquaculture products, the promotion of producer and inter-branch organisations and improving research and development for the industry. Success in these aspects will support and enhance progress, through the increased competitiveness of a sustainable aquaculture sector.

The conclusion is that it is time to have concrete actions if we want our future generations to be able to eat healthy European fish !

FACTS & FIGURES

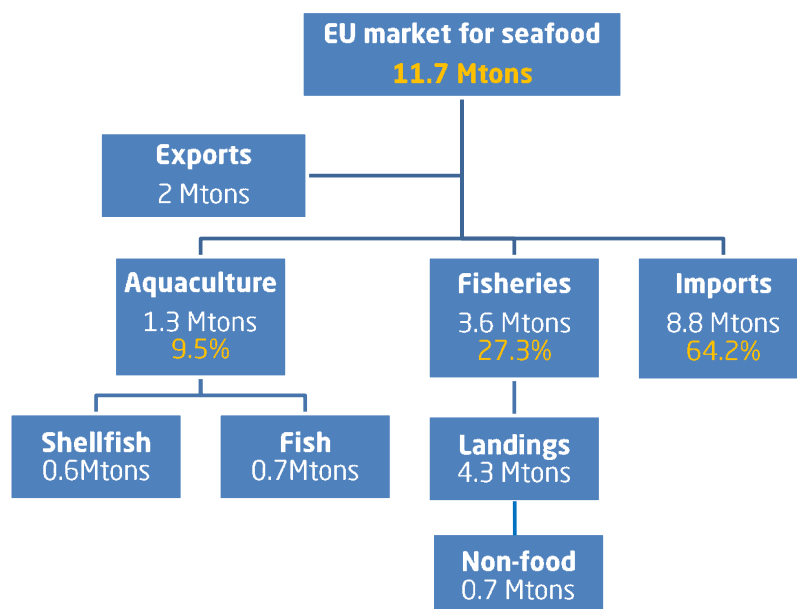


courtesy of the Polish trout breeders association

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The European Seafood Market 2012

Structure & Volume



The EU market supply is 13.7 million tons, with an imported share stable at just over 64%.¹

EU aquaculture provides 1.3 million tons, split between fish and shellfish, representing 26.5% of EU 'landings' (fisheries & aquaculture). The total quantity available, 11.7 million tons, for consumption shows a small decline compared to the previous year, due to less total supply and increased exports.

Imported products comprised 8.8 million tons, a reduction of 4.4% compared to last year, still representing around 64%.

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).

The European annual consumption levels per capita have dropped slightly to 23.2 kg, still higher than the average global consumption of 18 kg (FAO, 2013).

Looking at the increasing demand for seafood and the stable fisheries sector it is clear that there is a strong role that European aquaculture can play in filling the gap between EU consumption and domestic supply. To increase EU's self sufficiency level, European aquaculture needs to grow substantially. The Commission has understood this and therefore highlighted 'aquaculture' as an important pillar in the CFP reform

The EU is a major consumption market of seafood products in the world and the first importer of seafood products²

¹ A.I.P.C.E. – C.E.P.-EU Fish Processors and Traders Association 2013

² EUMOFA - The EU Fish Market, 2014 edition

European Aquaculture - 2013

Introduction

This section provides data for 2013 on fish aquaculture in Europe (officially confirmed and estimates), distinguishing 3 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 FEAP is published in the 'Facts & Figures' section of its website (www.feap.info).

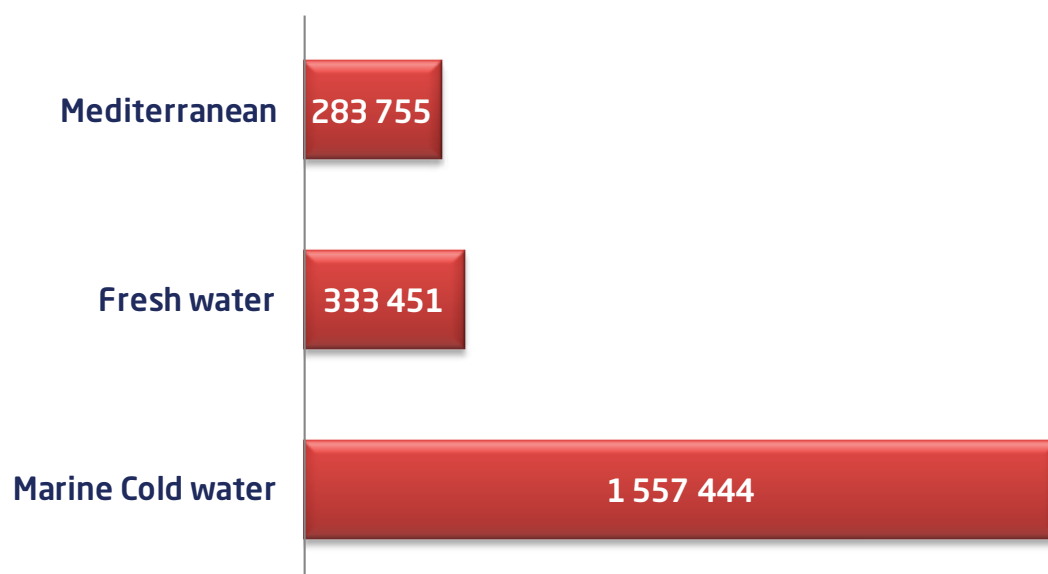
As in the full production report, some countries that have a total production of less than 1,000 tons or without reliable data access have not been included (Belgium/Luxembourg and Malta). In the species selection some minor freshwater species and tuna have not been considered due to lack of reliable data.

European Aquaculture 2013

The total European aquaculture production reached **2 174 650 tons**, a 13.6% increase compared to 2011 (FEAP annual report 2012), entirely attributable to the 'cold water species' (salmon in Norway). The other species have seen a rather stable production compared to 2011.

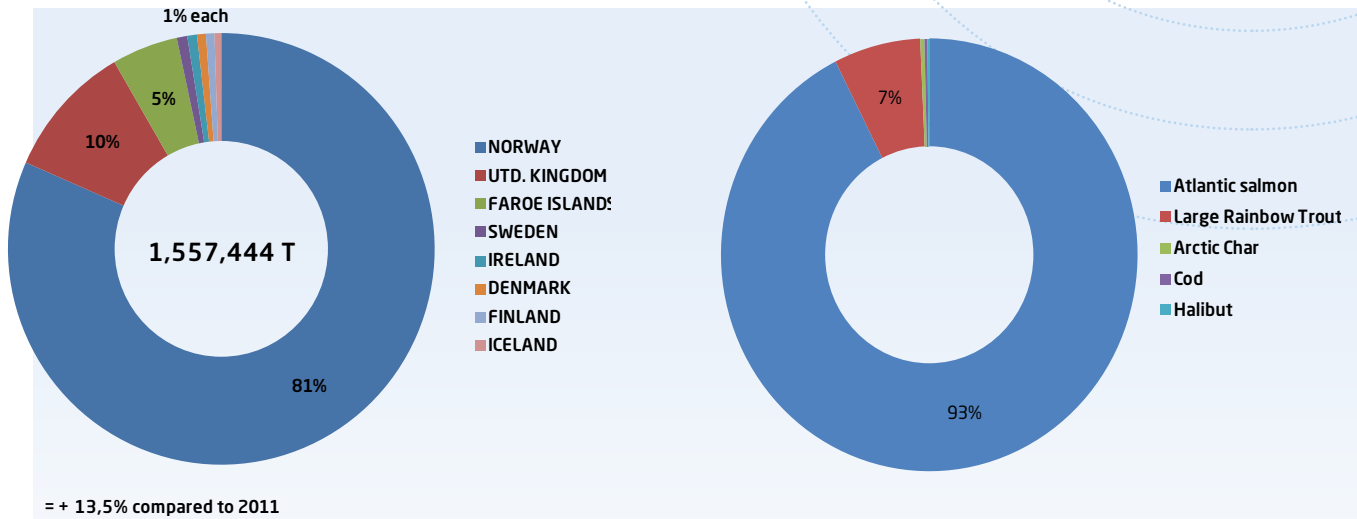
Cold water species represent 71.6% of the total production, fresh water species 15.3% and the marine Mediterranean species 13.1%.

The production split up per country and per species is presented in the following sections



Marine Coldwater

Marine Cold Water Production in 2013 per Country & per Species



Key observations

The peak was reached in 2012 with more than 1.6 million tons, due to lower temperatures in 2013 production was little less, still significantly higher than in 2011. Production is going as expected with high market demands.

Norway with its salmon production accounts for this increase. Iceland also saw its production increase from 4500 tons to 8400 tons (salmon & Arctic char).

UK production continues to grow at a steady and sustainable rate in Scotland. A small number of larger new sites are being stocked each year with the aim of maintaining production growth.

In Norway discussions are ongoing on future growth. 45 new so called "green licenses" to encourage more environmentally friendly production (sea lice and escapees) will be issued. Major concerns still are sea lice, Amoebic Gill Disease and Pancreas Disease, implementation of WFD, coastal area planning and access to good production sites.

Future: Consolidation on marine species. Closer cooperation between industry and NGOs on development of different sorts of multi-trophic aquaculture. Intensive production of cleaner fish (such as wrasse and lumpfish) as means of biological treatment against sea lice.

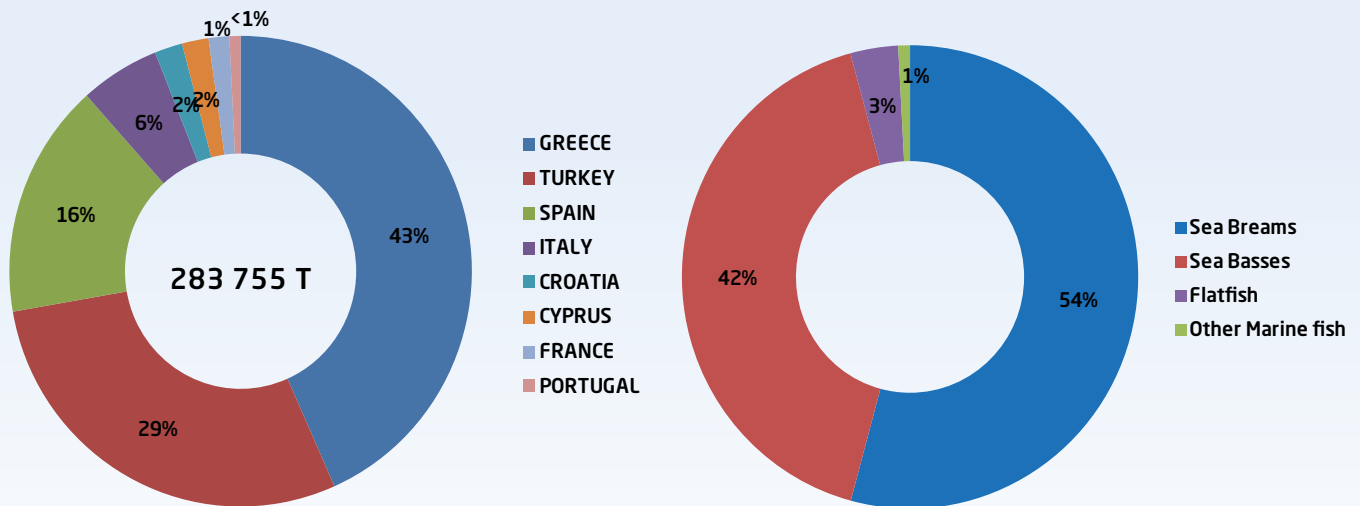


courtesy of FHL, Norway

Marine Mediterranean

Marine Mediterranean Production in 2013 per Country & per Species

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.



= +3,2% compared to 2011

Key Observations

As in previous years, the main producing countries are Greece, Turkey, Spain and Italy with seabream and sea bass as major species

Compared to 2011, production has increased, with growth seen in Turkey and Croatia but with most countries stable

Turkey continues to grow its production but faced some hatchery problems in assuring supply

Corporate consolidation seen in Spain, Greece and Turkey, but Greek companies experiencing difficulties related to national economic situation

Increased production activity is reported for Tunisia and Saudi Arabia

Concerns about productivity, potentially related to feed formulation changes (lower fish meal/oil content) and disease/infections; requests for more research on feed/nutrition needs for the main species

Future: Sharp production increases have levelled out; market has grown accordingly; new phase of market development should be handled cautiously; joint technical efforts needed within an environment of cooperation to resolve technical performance - particularly for sea bass and seabream

Growth is forecast but lessons must be learnt from the crisis in the Greek industry; sector must adapt to specific market demands for its products



CORMORANTS

Cormorant predation remains as one of the major problems in freshwater pond aquaculture. Over the last few years, several attempts have been made to find a general solution to this very complex problem. However, none of these have been successful in lowering the pressure on fish producers. The latest attempt - in which FEAP was an active participant - was the 'CorMan project - Sustainable Management of Cormorant Populations', financed by the European Commission. Despite the title of the project, most of the work focused on the development of a European cormorant 'platform', and two coordinated European cormorant counts (winter and summer). However, this project did not attempt to address or handle the conflict between cormorants and fish farmers.

Instead of looking to the EU and European projects to provide a solution to the cormorant predation problem, the industry was advised by the EC to take a different approach. As the problem is mainly caused by migratory populations, national authorities of the countries where cormorant populations cause significant losses on fish farm sites and natural waters, are encouraged to address the national authorities of the countries, where the cormorants are breeding and being protected. The EC has offered a mediator role in these bi-, or trilateral negotiations. One example of this is that the national authorities of the countries suffering from the problem (eg. France, Austria, Czech Rep., etc.) will make a joint approach towards the "nesting" countries (eg. Sweden, Denmark, Netherland, etc.).

FEAP is still very active in drawing attention to the cormorant problem across Europe, its representatives were present at several meetings during 2013, where the issue was addressed.



Courtesy of Bence Máté

The status of organic aquaculture in Europe

Source: Claire Zubiaurre – EAS magazine Vol 38 – September 2013

The Council of Europe defines organic production as being 'an overall system of farm management and food production that combines best environmental practices, a high level of biodiversity, the preservation of natural resources, the application of high animal welfare standards and a production method in line with the preference of certain consumers for products produced using natural substances and processes.'

Through a survey of national producer associations, an assessment of production data and the percentage of production put into organic markets were obtained for different countries and species.

What follows shows an overview of organic production of salmon, rainbow trout and sea bass/seabream.

Salmon

In Norway, responsible for the majority of the salmon production, only 0.7% is labelled as organic, which is mainly exported to UK and Germany. In the last five years its production has decreased due to different factors: higher costs, use of medicines to control diseases, effects of escapees and use of land based vegetables in feeds are a challenge for organic certification.

The main organic producer with 70% of its production is Ireland. In absolute value this corresponds to almost 10,000 tons of organic salmon (which is 50% of the total organic salmon production in Europe!). 90% is exported to France and Germany.

The UK is the other organic producer with roughly 3,000 tons (2% of total production), a decrease compared to 2010. The other 2 salmon producing countries, The Faroe Islands and Iceland have currently no organic production. Too high costs related to import of organically certified feeds or export to US (own standards) are the reasons for this.

Rainbow trout

The data refer only to Denmark, France, Ireland, UK and Poland. In Italy and Spain no significant organic production was detected and no data were available from Germany. In these countries, around 1600 tons of rainbow trout were certified to organic standards out of a total of 86,000 tons (2012 data).

France is the major organic trout producer (60% of total organic but only 3% of total French trout production), mainly produced for domestic market. Denmark is the next in absolute volume but again only 2% of its total

production is organic. However, here the production appears set to increase in coming years. In Ireland, 30% of their large rainbow trout is produced organically, which in absolute values represents only 100 tons. In Poland, only one farm is dedicated to organic production for local sales. Barriers for further development are lack of knowledge and consumer demand!

Sea bass/seabream

Greece, France and Croatia are involved in organic production of these species - 300 tons each in Croatia and France (respectively 6 and 9% of their total production) and 1,000 tons in Greece (<1%). Currently 3 farms with organic certification produce in Greece for mostly domestic sales. Market issues, complicated bureaucracy are the main barriers for further development. Spain & Italy also have small production but no precise data available, also data for Turkey are unknown. The main reason for this very limited production is economic (prices too high and (lack of) consumers' awareness.

Common carp = natural production

Common carp is mainly produced in Czech Republic, Poland and Hungary (60,000 tons). As the production typically occurs in natural pond systems with natural feed sources (only little supplementary feeding) it already is broadly perceived as organic. Therefore producers are hesitant to pay extra for organic certification.

In conclusion, over the last decade, organic aquaculture has shown significant growth but still represents only a very small percentage of the total European production. Higher production costs and many other issues are resulting in a slow-down in production.

Organic aquaculture represents around 1% of European fish farm production.



courtesy of Kefalonian Fisheries, Greece

FEAP'S PRIORITIES



Courtesy of Cromaris (Croatia)

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European affairs	26

Streaming Sustainability

European aquaculture for the next generation

We, the members of the Federation of European Aquaculture Producers, meeting in Dublin on 23 May 2013,

Believing that sustainable aquaculture can contribute greatly to the European strategies for 2020, Blue Growth and the BioEconomy

Understanding that generational change requires aquaculture to be sustainable in environmental, economic and social conditions

Emphasising the role of aquaculture in fostering coastal and rural communities in terms of activity and employment

Accepting that the consumer is the key to a successful aquaculture industry

Considering the position of European aquaculture within the Common Fisheries Policy

declare to promote and adhere to the following principles, so as to guarantee that the next generation of European aquaculture producers inherit a fully sustainable activity for the future.

CLEAN WATER RESOURCES

The bedrock of our industry is clean water, which we will protect, use respectfully and enhance at every opportunity by minimising impacts on the quality of the resource and by increasing efficiency of use through new technologies and improved management.

A HEALTHY ENVIRONMENT

We must pass on both a healthy business and a healthy environment to the next generation, since one will not work without the other; each decision taken must be tempered by striking the right balance between these two driving forces.

A SCIENCE-BASED PROFESSION

Our future depends on the promotion and application of science of the highest standard, encouraging sustainable innovation and communicating best practice so as to harness the production potential of European waters and make optimal use of the resources required.

We pledge to make our knowledge and experience available to the next generation.

PARTNERING FOR SUSTAINABILITY

We commit to open and transparent partnerships with policy-makers, decision-takers and aquaculture stakeholders to establish the foundations and responsibilities for sustainability in all aspects of the aquaculture value-chain.

RESPECT FOR THE CONSUMER

Sustaining and improving consumer confidence in European aquaculture will be furthered by establishing the highest standards for high quality, healthy products, secured by robust control and traceability systems.

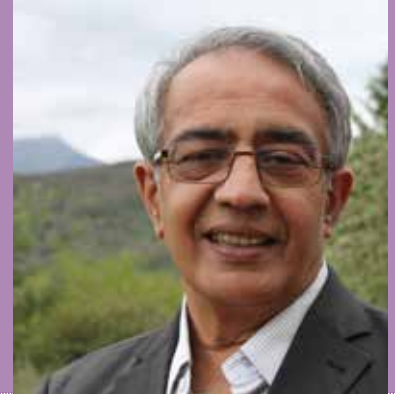
Alands Fiskodlarförening
Asociacion Empresarial De Productores De Cultivos Marinos
Associazione Piscicoltori Italiani
British Trout Association
Croatian Chamber Of Economy – Aquaculture
Cyprus Mariculture Association
Dansk Akvakultur
Faroese Fish Farmers Association
Federation Française d'Aquaculture
Federation of Maltese Aquaculture Producers
Hungarian Fish Farmers Association
Icelandic Aquaculture Association



Irish Salmon Growers Association
Lithuanian Association of Aquaculture Producers
Norwegian Seafood Federation
Organizacion De Productores De Acuicultura Continental
Productschap Vis / Nevevi
Rybářské Sdružení České Republiky
Scottish Salmon Producers' Organisation
Stowarzyszenie Producentów Ryb Łososiowatych
Suomen Kalankasvattajaliitto
Union Professionnelle Des Pisciculteurs Belges
Verband Der Deutschen Binnenfischerei
ΣΥΝΔΕΣΜΟΣ ΕΛΛΗΝΙΚΩΝ ΘΑΛΑΣΣΟΚΑΛΙΕΡΓΕΙΩΝ (ΣΕΘ)

Sustainable aquafeeds

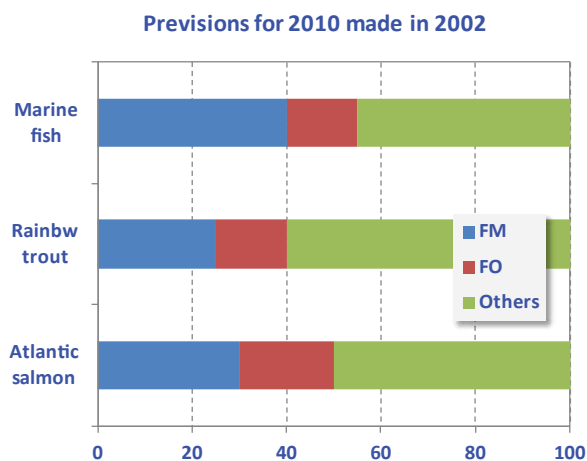
Professor Sadasivam Kaushik
Director of Research in INRA- France



It is clear that wild-caught fisheries is stagnating since a few decades and that this will not change in the years to come. Aquaculture's contribution to seafood supply is on the increase at the global level and the predictions are that aquaculture should provide for most of the seafood by 2030. With the increasing demand for farmed and tailored seafood, there is also a demand for high quality feed ingredients supplying essential nutrients suitable for farming fish

Sustainable development of European fish farming is dependent on the availability of feeds relying less and less on capture fisheries derived fishmeal and fish oil. European fish farming sector has made a determined shift towards the use of sustainable feeds while continuing to ensure the health and welfare of fish and the nutritional value of farmed seafood. The concern as regards the use of a portion of capture fisheries for production of fish meal (FM) and fish oil (FO) as ingredients for the supply of such essential nutrients is not new.

Even by 2002, it was predicted that by 2010, inclusion of FM and FO in fish and shrimp feeds will be reduced to levels as follows:



Different research groups have individually and collectively strived to work in a systematic manner towards the replacement of FM and FO as essential amino acid and fatty acid sources by plant protein and oil sources

Examples of such EU-research projects are PEPPA (Perspectives of Plant protein usage in Aquaculture) and RAFOA (Researching alternatives to fish oils in aquaculture). PEPPA established that fish meal in fish feeds containing fish oil could be largely replaced with plant protein sources. .



RAFOA established that fish oil in fish feeds containing fish meal could largely be replaced by single or mixtures of vegetable oils and that the nutritional value of flesh, in terms of fatty acid profiles, could be tailored using a finishing feeding approach. It was then worth analysing the extent to which both FM and FO can be replaced simultaneously without any prejudice to the health and welfare of the farmed fish. The primary goal of AquaMax, an integrated project, was to replace as much as possible of both the FM and FO currently used in fish feeds with sustainable, alternative feed resources that are as free of undesirable contaminants as possible. In these studies, the objectives were to develop low FM-FO feeds, while maintaining the growth performance, the feed conversion efficiency and the health and welfare of the farmed fish, and ensuring the health - promoting properties, safety, quality and the acceptability of the final product to the consumer. Aquamax also took into account the environmental sustainability issues applying the life cycle analysis (LCA) approach in the production of different species: Atlantic salmon, rainbow trout, gilthead seabream and carps.

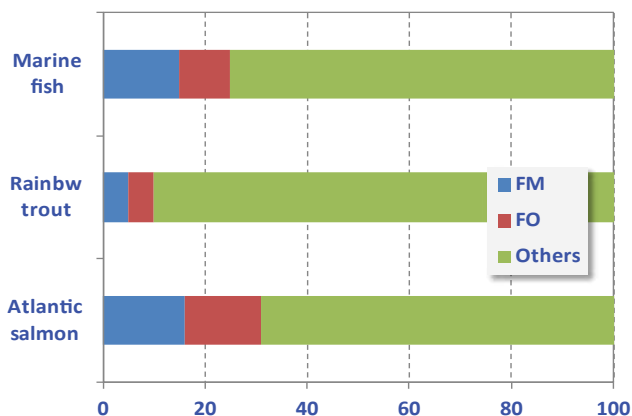
Such concerted efforts, often undertaken in cooperation with feed producers and farmers have indeed led to significant reductions in the inclusion of FM and FO in feeds used for European fish farming, using mainly plant-derived alternatives, taking fully into account the European legislations and their evolutions over time. Current research and industrial practice has already led to significantly reduced levels of FM and FO in fish feeds in Europe, reducing our reliance on wild fishery-derived feedstuffs.

Current work under way in this context (www.arraina.eu) takes this further to analyse the possible long term effects of alternative feeds over the full life cycle of different species of interest to the European aquaculture.

In terms of sustainable aquafeeds, the prospects of developing feeds using other ingredients are also high. These include full exploitation and use of co-products from terrestrial agriculture (plant proteins and oils, biofuel industries), from animal production (processed terrestrial animal proteins PAPs, legally authorised for use in EU aquafeeds since the middle of 2013), from the aquatic environment (co-products of post-harvest technologies of food fish and of aquaculture, macro or micro algae), insects (valorisation of organic wastes) or single cell proteins.

As regards the supply of $\Omega 3$ long-chain polyunsaturated fatty acids ($\Omega 3$ LC-PUFA) essential for fish, there is also much potential through proper exploitation of existing sources from the aquatic trophic chain and through genetic improvement of plants or even from transgenic plants tuned to produce these long-chain PUFAs so important for human health.

Achieved after Aquamax, 2010



Water Framework Directive



courtesy of Ferenc Levai, Hungary

Aquaculture has been growing at 6.9%/year globally, but in the EU this level of growth has not been achieved, with production remaining at the same level since at least 2000. Under the Common Fisheries Policy Reform, the European Commission is seeking to promote the expansion of the aquaculture sector, and has published a Communication on Strategic Guidelines for the sustainable development of the industry¹.

On the basis of these guidelines, Member States are now elaborating multi-annual national plans for the development of sustainable aquaculture. In this context, it is necessary to find the most effective way to achieve food security and economic development, while minimising negative environmental impacts. As a young and diverse industry, there is a very real need for knowledge exchange across the industry-academia-government axis to inform the decision-making process in policy units at EU and Member State level.

The EC has set up a project to provide support for the development of guidance documentation for the implementation of environmental legislation - and especially the Water Framework Directive and the Marine Strategy Framework Directive - in the context of the development of sustainable aquaculture.

¹ COM(2013)229final: http://ec.europa.eu/fisheries/cfp/aquaculture/official_documents/com_2013_229_en.pdf

How best to manage the environmental impact of aquaculture activities, and to support the potential realisation of mutual benefits between aquaculture development and environmental protection.

This is the aim of the project "Background information for sustainable aquaculture development addressing in particular environmental protection" to be delivered by CEFAS (the Centre for Environment, Fisheries and Aquaculture Science) in the United Kingdom contracted by the European Commission (DG ENV in cooperation with DG MARE) for this purpose.

The work will draw on the experiences of policy-makers, regulators, industry and NGOs right across the EU-28. Through 4 two-day good-practice workshops: in the North East Atlantic (Dublin, April 2014), Mediterranean (Athens, May 2014), Black Sea/Danube (Vienna, May 2014) and the Baltic (tbc)

Relevant stakeholders will build up a clear picture of activities taking place on the ground and discuss the opportunities and challenges presented by the current legislative framework (WFD and MSFD in particular).

An opening workshop was successfully organized in Brussels on the 6th March to introduce the project to Member State experts charged with implementing the environmental legislation in question (i.e. the Marine Strategy Coordination Group for the MSFD and the Strategic Coordination Group for the WFD) and Member State experts responsible for the development of the aquaculture sector (e.g. from fisheries ministries), as well as other relevant aquaculture experts.

A closing will be organized before the summer break to present the draft guidance document to the same target audience.

The FEAP will be strongly represented in every workshop to highlight the key factors to be considered and to comment and help steer the project and guidance documents.

Aquaculture for the next generation

One of the core values of FEAP's Dublin Declaration on Sustainability is the continuity of the European aquaculture sector by the next generations. To follow this, we asked some young people why they chose to start in this business, what message they have for other potential newcomers and their ideas on the future development of the sector.

JIRI BOSSUYT - started up Fish2Be

www.Fish2Be.eu



Who ?

35 years old, Belgian, MSc in Aquaculture (Ghent), working before in MRS (Italy), PDS Irish Waters Perch (Ireland), pike-perch project Czech Republic, Malta and Belgium (Sturgeon)

Company

Start up January 2013, Kinrooi (B): production of pike perch juveniles in recirculation – now 200,000 juveniles, plans to extend 100 fold in future

Why ?

Idea back in 2009, realising reasons for unreliable cultivation results. Fish species with good market potential, high-end market, demand for more continuous supply of juveniles

Main issues ?

Finding the right partners to invest, restrictive legislation on ownership, lots of paperwork

Message

Promotion needed at government level, networking is important, foresee enough capital and surround yourself with professional experts

Future of EU aquaculture ?

Believes in EU to support inland aquaculture so to develop increasingly. Combining the right knowledge, young potential and good starting capital should be the way forward. Creation of platforms where these come together would be beneficial for aquaculture to develop.

DAMIEN O'KEEFFE - Hatchery manager in Tropo Farms Ltd - www.tropofarms.com



Who ?

32 years old, Irish, BSc in Zoology (Cork), working experience in Ardtoe (Scotland)

Company

Established in Ghana, since 2000, largest Tilapia producer in West Africa – produces fry for several ongrowing sites for domestic consumption

Why ?

Interested since childhood in biology and via aquaculture development centre in Zoology Dept. I came into contact with fish farming, challenge of producing and growing fish

Main issues ?

From an Irish perspective, as someone dreaming from operating my own farm, the licensing of sites for farming seems almost impossible, lack of support for young farmers to start up a business, public negative perception of fish farming

Message

Best way to promote aquaculture is through education from young primary school level up to adults, showing benefits of fish protein that can be produced in a sustainable way. To encourage young people : for me personally, the variety and constant challenges make fish farming a unique and very rewarding experience.

Future of EU aquaculture ?

EU aquaculture should have a bright future – once licensing issues, funding, start-up grants get resolved I feel we have a generation of ambitious, well-educated farmers waiting to step up and take this industry firmly into the 21st century.



2012 set the scene for aquaculture's position in the reform of the Common Fisheries Policy (CFP), notably through the Commission's 'Strategic Guidelines for the Sustainable Development of European Aquaculture', proposals that the FEAP welcomed.

On the basis of the guidelines, the Commission and EU States will collaborate to help increasing the sector's production and competitiveness. EU States have been asked to establish multi-annual plans to promote aquaculture. The Commission will help with the coordination and exchange of best practices.

2013 was more of an interim period composed of final consultations, reflections within the European bodies that were followed by trilogue discussions between the European Council, the European Parliament and the Commission prior to decision. For aquaculture and fisheries, it is not only the Common Fisheries Policy that is important but also the 'implementing' legislation that is represented by the Common Organisation of the Markets for Fisheries and Aquaculture products (COM) and the financial instrument, the European Maritime and Fisheries Fund (EMFF).

While both the CFP and the COM were approved in December 2013, the EMFF was delayed by political disagreement. Early in 2014, accord was reached on the EMFF's content and budget. The fund will support European aquaculture so that it can fully develop its potential. The EMFF provides €6.5 billion that will be used to boost innovation, help communities to diversify their economies, finance projects that create new jobs and improve the quality of life along European coasts.

The COM covers principally the organisation of the sector so as to support market stability and a fair income for producers. Focusing more on improved governance and sectoral organisation for these objectives, support for producer organisations (POs), associations of these POs and inter-branch (inter-professional) organisations is evident. As opposed to mechanisms targeting market intervention, production and marketing plans – formulated by POs – now form the crux of the collective management of producer activities.

Improving data collection is a common element of the CFP and part of this will be made through the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) which provides data on the volume and value of fisheries and aquaculture products from the first sale to the retail stage, including imports and exports. EUMOFA is anticipated to contribute to market transparency and efficiency as well as analysing EU market dynamics that can support business and policy decisions.

The sustainable development of European aquaculture is the underlying goal of all of these components of legislation that affect European aquaculture, which will all come into action in 2014.

The importance of good governance in implementing European legislation is evident and, for European aquaculture, a new Advisory Council is to be created for aquaculture. Originally created for fisheries, Advisory Councils (ACs) are stakeholder-led organisations that provide the Commission and EU countries with recommendations on management matters and also in the context of regionalisation. Compared to the regional fisheries ACs, the Aquaculture Advisory Council (AAC) will be European in its coverage. All ACs have to account for multi-stakeholder interest, where 60% are to be 'operators' within the aquaculture value-chain, while 40% are 'other' stakeholders can be consumer interests, environmental NGOs, research interests etc.

The FEAP has coordinated consultation with other stakeholders for the creation of the AAC, notably with the Association of European Mollusc Producers, COPA-COGECA, the NGO Contact Group of ACFA and the European Transport Workers' Federation. It is anticipated that the Aquaculture Advisory Council will be constituted during 2014 following wider stakeholder consultation efforts on the scope of its activities and constitutional requirements.



Horizon 2020

2014 also brings a new Research and Innovation Framework Programme into action – Horizon 2020 – which is the biggest programme ever with nearly €80 billion of funding available over 7 years (2014 to 2020). Horizon 2020 is evidently targeting more mission-oriented research, wanting to get great ideas from the lab to the market, so as to drive economic growth, create jobs and increase the competitiveness of European businesses.

Based on excellent science, industrial leadership and tackling important societal challenges, Horizon 2020 is designed to make it easier for the public and private sectors to work together in delivering innovation.

For aquaculture, the activity is seen as having a large potential for the development of healthy, safe and competitive food products, as well as for environmental services and energy production – for example, from algae.

Research efforts are to be made for to achieve or improve the domestication of some species (established and new species), on interactions with the environment, on health and nutrition of farmed aquatic organisms and on reproduction and breeding, which are seen as being among the main obstacles to the sustainable development of European aquaculture. In addition, research will also address the social aspects of the seafood sector, which is essential for the cohesion of the social fabric in the European coastal and rural areas.

The 'Inseparable' campaign

Nobody can ignore how the word 'sustainable' has come to dominate the terminology associated with European aquaculture and fisheries. The European Commission has launched the 'Inseparable' campaign – that is promoting knowledge about fish and seafood so as to 'eat, buy and sell' sustainable products. The new Common Fisheries Policy is organised so as to boost the European fisheries and aquaculture sectors and make them more environmentally, economically and socially sustainable. The website of the 'Inseparable' campaign provides on a range of resources to help the consumer choose seafood that is produced by sustainable aquaculture, comes from healthy populations, is fished responsibly – supported by

- Information from the European Commission and on the Common Fisheries Policy,
- Inspirational stories on sustainable seafood.
- Information on sustainable seafood in each Member State

The FEAP has given active support to the development of 'Inseparable' and the launch of the 'Farmed in the EU' component that will premiere at the 2014 European Seafood Exposition in Brussels.



View of the FEAP President

Today, we contribute effectively to bringing high quality, safe and healthy products to consumers. On the other hand however, not a week passes by without a media programme or articles that are against aquaculture. Indeed, agriculture and agri-food, which certainly have experienced excesses, have undergone major crises (mad cow disease, bird flu, traceability scandals). Aquaculture, which has never known such excesses, has had to grow and develop in an increasingly suspicious media environment.

In the heart of Europe, a large part of the communication effort of our national producers' organisations is now devoted to defending the sector's image even though our practices are irreproachable. We do a very good job of which we are proud and that we want to be discovered and recognised. We welcome the new 'Inseparable' promotion initiated by the Commission.

European aquaculture has extraordinary virtues: it reduces the deficit in the trade balance, it creates jobs in the most remote sites in Europe, it provides consumers with quality products with excellent nutritional characteristics and it defends our lands and our regional specificities. While we are well aware of this message, it is time to share this truth with the media and the consumers. With knowledgeable and rightly-informed consumers, our markets will increase and support the growth of aquaculture, providing new opportunities for development, investment and jobs!

FEAP'S ACTIVITIES



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FEAP involvement in European R&I projects



FindIT

Project title: FindIT - A cutting edge platform for data management and analysis to assist European fish aquaculture in its development towards higher performance & competitiveness.

What: An innovative IT solution, 'FindIT', was designed initially to enable sectorial benchmarking, allowing a hatchery to measure its own performance against consolidated data from other hatcheries (outcome of a previous project 'FineFish'). The aim of the current project is to further develop the tool and to bring the system to a commercial level so that a widespread community of users can use it. With extensive data collection and analyses – using innovative data-mining techniques - critical factors can be discovered that explain the variability of pre-defined Key Performance Indicators (KPI's). This can lead to preventive and corrective actions that will continuously improve competitiveness of hatchery operations and support future strategic decisions.

Coordinator: FEAP, France/Belgium

Partners: In total, 8 partners participate in this 2 year project.



OrAqua - www.oraqua.eu

Project title: OrAqua – European Organic Aquaculture – Science based recommendations for further development of the EU regulatory framework and to underpin future growth in the sector

What: The overall vision of the OrAqua project is the economic growth of the organic aquaculture sector in Europe, supported by science based regulations in line with the organic principles and consumer confidence.

OrAqua will suggest improvements for the current EU regulatory framework for organic aquaculture. The project will focus on aquaculture production of relevant European species of finfish, molluscs, crustaceans and seaweed.

Coordinator: NOFIMA AS, Norway

Partners: 13 OrAqua project partners including FEAP



The next level of aquaculture breeding

FishBoost - www.fishboost.eu

Project title: Boosting European aquaculture by advancing selective breeding to the next level

What: "To improve the efficiency and profitability of European aquaculture by advancing selective breeding to the next level for each of the six main finfish species through collaborative research with industry". A mixture of low and high- tech technological advances will be developed to move the breeding programmes of the 6 main finfish species to the next level. This step-change advance will facilitate balanced and sustainable breeding programmes applying a wide set of traits, breeding tools and technologies. A dissemination programme will deliver these results to SME's and other end-users thereby advancing existing and stimulating new aquaculture breeding programmes in Europe

Coordinator: NOFIMA AS, NORWAY

Partners: 14 well-recognised RTD participants and 7 SMEs, 4 large industries, 1 NGO &, FEAP collaborate in a five year comprehensive research project



TRAF00N - www.trafoon.eu

Project title: Traditional Food Network to improve the transfer of knowledge for innovation

What: In the European Union, Small and Medium Sized Enterprises (SMEs) in the food sector are increasingly under pressure due to the opening of markets, an increasing demand of standardized and price competitive food products by the consumers, the rising importance of large retailers, and the challenges of conforming to governmental regulations. These increased demands put at risk many traditional foods as well as traditional processing techniques still available today. To support these traditional SMEs, TRAF00N has as goal to establish a knowledge transfer network with a focus on food products made of grains, fish, fruits, vegetables and mushrooms to support traditional food producing SMEs.

Coordinator: University of Hohenheim, Germany

Partners: 30 partners including FEAP

Participation & Promotion

FEAP is actively involved in sectoral discussions on aquaculture as well as broader issues that affect the profession. FEAP representatives also participate in appropriate Conferences, Workshops and project meetings where aquaculture development is a focal point.

In 2013 FEAP participated in

- EU Presidency, Commission and Parliament meetings related to aquaculture
- European Commission workshops on Advisory councils and Technology Platforms
- Animal Health Advisory Committee (AHAC) meetings
- Joint meetings with FVE (Federation Veterinarians Europe) and FEFAC (European Feed Manufacturer's Federation)
- 'Aquaculture in Motion' – FEAP event, Brussels
- EATIP AGM, Brussels
- Marine Spatial Planning (MSP) workshops
- WFD workshops: guidance document aquaculture
- BioEconomy panel meetings
- Aqua-TNET meeting, Istanbul
- EUMOFA – Markets meeting - Brussels
- Sturgeon Producers meeting at ESE Brussels
- Aquaculture conferences:
 - RAS workshop Paris
 - IFM eel conference, London
 - ESCO conference, the classification of European Skills/Competences, Qualifications and Occupations, Brussels
 - Committee of the Regions and the European Bureau for Conservation and Development (EBCD) workshop: 'how to boost EU aquaculture?'

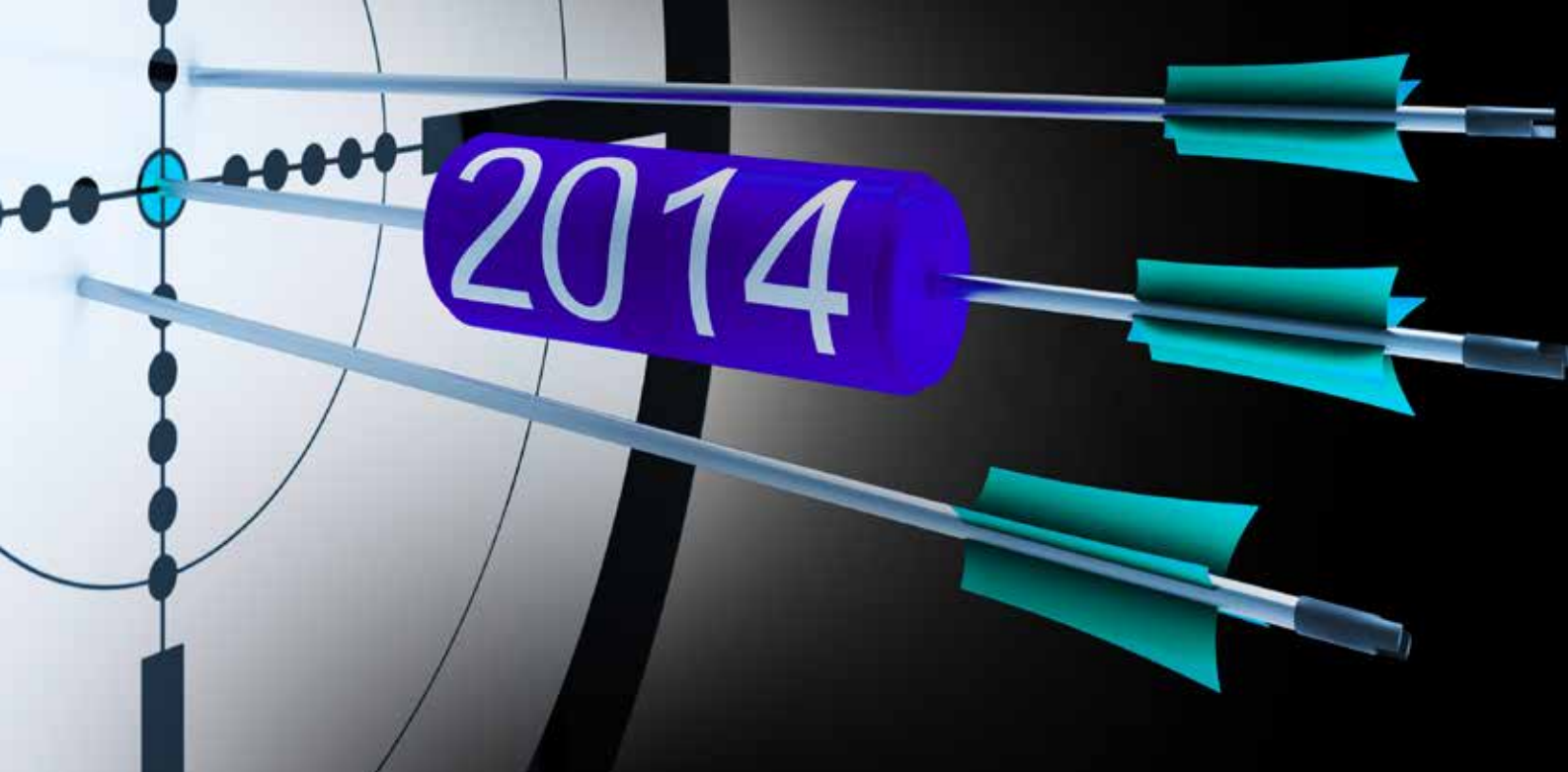


The FEAP organised its 2013 Annual General Meeting in Malahide (Ireland) in May and its Presidents' Meeting in Brussels (Belgium) in November.

The FEAP Dublin Declaration on sustainable European Aquaculture and the ceremony of the FEAP Award of Excellence were among the highlights of these meetings.

*The **46th Annual General Meeting** will be held in Rovinj (Croatia) on May 23-24 2014, hosted by the Croatian Chamber of Economy, aquaculture unit, to provide the positions for FEAP's future work.*

*The **Presidents' Meeting** will be in Brussels in late 2014.*



The Future: what brings 2014?

2014 will not only bring the new Common Fisheries Policy and its related legal instruments into action but also several key actions emanating from the 2013 Strategic Guidelines for the Sustainable Development of European aquaculture. The workshops on 'Development of guidance for European aquaculture in relation to the WFD and the MSFD' will be accompanied by a series of missions by the Food and Veterinary Office of the Commission that will examine the issues of fish health and welfare throughout European fish farming.

The creation of the new Aquaculture Advisory Council will be initiated, following stakeholder agreement on its objectives, function and budget. A complete dossier has to be prepared and submitted to the EC and the Member States during 2014.

A new European Parliament will be in place after the summer elections and FEAP will pursue its positions with a new Fisheries Committee.

A number of new projects involving FEAP have been described and these start up in 2014, using many experts drawn from the FEAP Member Associations.

Contributions to the Bioeconomy Panel will continue and further the position of aquaculture in the promotion of the European bioeconomy.

Furthering a pilot phase for the Environmental Footprint of fish production will be pursued.

In 2014, FEAP's consultation efforts will thus focus on

- Continued dialogue with the EC on fish welfare and the availability of veterinary treatments and biocides, in consultation with the Federation of European Veterinarians
- Contributing to the creation of the new Aquaculture Advisory Council
- Consultation, with both the FEFAC Fish Feed Committee and IUCN, on the improvement of compound fish feeds - development of project on the environmental footprint of fish production
- Participation in the workshops on new Guidelines for the Water Framework Directive and the Marine Strategy Framework Directive
- Participating in actions relating to the Strategic Research and Innovation Agenda developed by the EATiP
- Integration of aquaculture within the European framework of the development of the BioEconomy
- Participating in the new EU projects described

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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 produktų uždarosios recirkuliacinės sistemos gamintojų asociacija
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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