

#### The EU aquaculture policy and progress in European countries to ensure area access and aquaculture growth

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#### Today's topic

Report on the regulatory framework for aquaculture and access to production areas to reach the aim of increased aquaculture production

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How to promote aquaculture growth

- European policy
- National policies and actions
- Growth ambitions
- Regulatory challenges
- Access to production sites



Illustration: Oddvar Dahl, Nofima

FUTURE



- EU does not have a common aquaculture policy
- Policies addressing and relevant for aquaculture
- Analyse national strategies for increased production in selected case countries
  - Greece, France, and Germany, and also Norway



# EU policy on aquaculture

#### 2013 CFP

- Non-binding union strategic guidelines for aquaculture development
- Member States to develop Multiannual national strategic plans for aquaculture 2014-2020 by June 2014

and

- Integrate aquaculture into marine, coastal and inland spatial planning
- Marine Spatial Planning Directive 2014
  - Member states to establish and implemnet MSP, including dedicating areas for aquaculture by March 2021

2016 Summary of National strategic plans: 25% increase by 2020

2018 Analysis of the performance: aims «appear to be too optimistic or even unrealistic»

2020 Interim evaluation of the Open Method of Coordination

2021 New strategic guidelens for European Aquaculture 2021-2030

## Our focus

- Multiannual national strategic plans for aquaculture
- Marine spatial planning (landbased planning)
- Implementation

### Aquaculture production in the four case countries in 2018

|          |           | Bivalves,     | Freshwater | Other marine |           |
|----------|-----------|---------------|------------|--------------|-----------|
| Country  | Total     | invertebrates | fish       | fish         | Salmonids |
| Germany  | 33 091    | 15 944        | 7 268      |              | 9 852     |
| Greece   | 132 413   | 22 010        | 404        | 107 705      | 2 127     |
| France   | 186 775   | 144 089       | 3 826      | 4 442        | 33 981    |
| Total EU | 1 319 491 | 623 916       | 101 500    | 190 195      | 363 104   |
| Norway   | 1 355 988 | 1 721         | n.a.       | 2 872        | 1 351 217 |

European aquaculture production by country and by commodities (2018) (EUMOFA, 2018)

#### Growth ambitions in 2014

#### Multiannual national strategic plans for the development of aquaculture activities

| Country | Production in 2013       | Growth target by 2020   |
|---------|--------------------------|---|
| Germany | 23 000 tonnes            | 52 000 tonnes, 96 % increase<br>Freshwater 148 % increase<br>Mollusc 144 % increase                           |
| Greece  | 145 000 tonnes           | 170 000 tonnes, 49 % increase   |
| France  | 200 000 tonnes           | 265 000 tonnes, 22 % increase<br>Mollucs 12% increase<br>Freshwater 28% increase<br>Marine fish 233% increase |
| Norway  | 1 000 000 tonnes in 2010 | No explicit numbers - sustainable growth in 2013<br>But fivefold production by 2050 «on the table» in 2009    |

### Germany – fresh water production (148% increase)

#### Planned actions related to regulations

- assess the 16 federal states' legislation and to develop proposals for the simplification of the licencing processes
- revise the current provisions for construction law privileges for aquaculture projects
- appoint coordinators ('pilots') for aquaculture licencing procedures in the federal states
- develop guidelines for the licencing or expansion of aquaculture enterprises for the use by licencing authorities
- organize training for licencing authorities in order to shorten and harmonise the licencing processes

Aquaculture production by culture environment the Federal Republic of Germany (tonnes) Source: FAO FishStat



# Achievements

- Growth objective not achieved. In particular RAS overestimated, both the number of operated plants and volume, and finfish
  - available space, environmental concerns and lack of profitability/German food prices
- Related to area access: not possible to privilege aquaculture facilities in the building law.
- The license process has improved in some federal states,
  - authorization process pilot, an aquaculture network, guidelines for aquaculture investors, spatial planning and designated priority areas for aquaculture.
- The preparation of national guidelines for use of European Maritime and Fisheries Fund (EMFF) took 2 years, causing delays in planned actions dependent on this funding
- (Designation of priority areas for integrated multi-trophic aquaculture systems IMTA (e.g. mussels and/or algae culture) in the Baltic Sea in the spatial development plans at the federal state level)

### Greece – marine fin fish production (49 % increase)



Aquaculture production by culture environment in Greece (FAO, National Aquaculture Sector Overview, 2020)



#### Multiannual Strategic Plan for Aquaculture 2014

Planned actions related to simplifying and reducing legal and administrative proceudres

- Operation of the competent license authority as a one-stop shop adopted in 2014.
- Establishment of a National Council for aquaculture.
- Establishing, adopting and implementing rules for the new aquaculture law
- Encoding environmental requirements for the establishment of new aquaculture sites.
- Releasing a handbook for the dissemination of permitting information and conduct training programs for the staff of the administration on the procedures.

On Spatial planning

- Implement the national Framework for Spatial Planning and Sustainable Aquaculture Development
  - the implementation of a spatial development model,
  - the establishment of new production sites,
  - the reorganization of existing production sites,
  - the regulation of the relations between coastal zone stakeholders, the diversification of future production,
  - development of offshore aquaculture

# Marine Spatial Planning

- No legally binding MSP
- But sectoral special frameworks for spatial planning for aquaculture
- 2011, under revision
- Detailed national zoning plan for aquaculture based on carrying capacity criteria
  - Ensure acceptable environmental impact
  - Resolve user conflicts
  - Promote aquaculture production and economic development



Zoning system for locating different kinds of aquaculture production and species Define specific criteria for aquaculture units

## Achievements

- Implementaiton of the one-stop-shop has accelerated the application process, time reduced from 25 months to 18-24 months
- But, the process is still too slow of the 23 application submitted since 2015 only four are approved
- Improvement on how to interprete regulations by different authorities (national and regional)
- Positive development with the revision of the marine spatial planning for aquaculture, but concern that the process which should have been finalised in 2021 are prolonged to 2023.

## Norway – experienced 50% increase from 2010



Aquaculture production by culture environment the Kingdom of Norway (tonnes) Source: FAO FishStat



## A new approach to increased production

- Production areas and "traffic lights" 2017
- The Norwegian coast is divided into 13 aquaculture production areas
- production growth dependent on environmental performance in each zone
- based on one indicator: the presence of sea lice
- Considered every two years
- If green, companies can apply for/buy up to 6% increased production



# New strategy for aquaculture 2021

- «Sustainable growth»
  - Simplify regulations of coastal aquaculture (main production)
  - Further develop the traffic light sytem
  - Revise the arrangements with special permits (190 000 tons/20% of production)
  - Action plan for land based aquaculture
  - Facilitate ocean based aquaculture

# Action plan for land based aquaculture 2015

#### • Follow up

- 2016 Free licenses for salmon prouction on land
- 2018 Technical standards for landbased aquacultre production
- 2021 Food health risk analysis to prevent spread of diseases, to inform regulation

Thank you for your attention!