

# The European Commission's science and knowledge service

Joint Research Centre

## Economic Report of the EU Aquaculture Sector

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# Data call, working group, report and data

- Call for economic data on the EU aquaculture sector (December 2020 – January 2021).
- The STECF EWG virtual meeting in February 2021. Meeting attended by 32 experts from 22 countries and 3 JRC experts.
- The EWG meeting and its report are done on a biennial basis (once every two years).
- The report provides a comprehensive overview of the latest information available on the production, economic value, structure and competitive performance of the aquaculture sector at the national and EU level for the years 2008 to 2018.
- In addition to the report, also the data are published.

# Contents of the report

- EU Aquaculture Sector Overview
- The Structure of the EU aquaculture sector
  - Marine finfish aquaculture (salmon, seabream & seabass, bluefin tuna and other species)
  - Shellfish aquaculture (mussels, oysters, clams and others spp.)
  - Freshwater aquaculture (trout, carp and other species)
  - Algae
- National Chapters (EU-27 + UK in the annex)
- Estimation of Covid-19 impact on the performance of the sector
- Nowcast estimation of a selection of indicators to 2019 & 2020
- Socio-Demographics of the EU Aquaculture Sector

# The EU aquaculture in numbers (2018)

- There are about 15 thousand enterprises (whose main activity is aquaculture).
- More than 80% of these enterprises are micro-enterprises, employing less than 10 employees.
- The number of employees and full time equivalents (FTE) is estimated to be 69 thousand and 39 thousand, respectively.
- Production (first sales) reached 1.2 million tonnes and EUR 4.1 billion in value.
- The overall EU aquaculture sector has experienced a slight decrease in the economic performance compared to 2017.
- This decrease is driven by the marine fish segment.

# Main species by weight and value (2018)

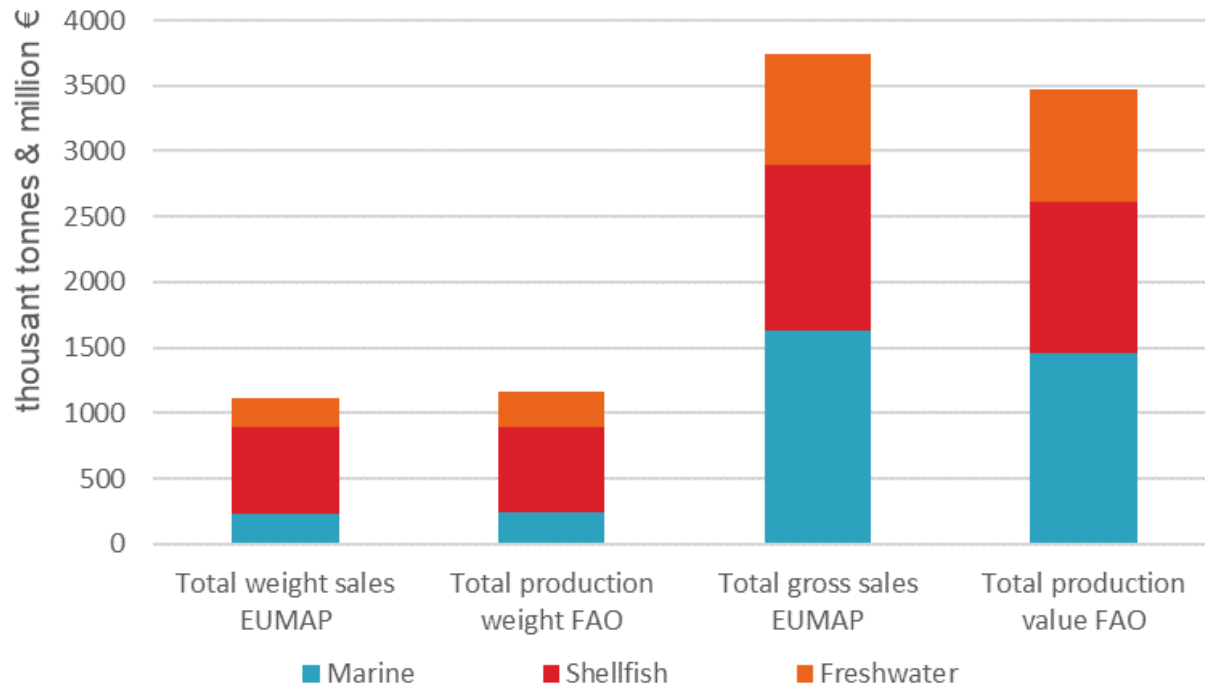
- Main species by weight are mussels, trout, oysters, seabream, seabass and carp.
- Main species by value are trout, seabass, oysters, seabream, mussels, clams and carp.



Source: FAO, 2021

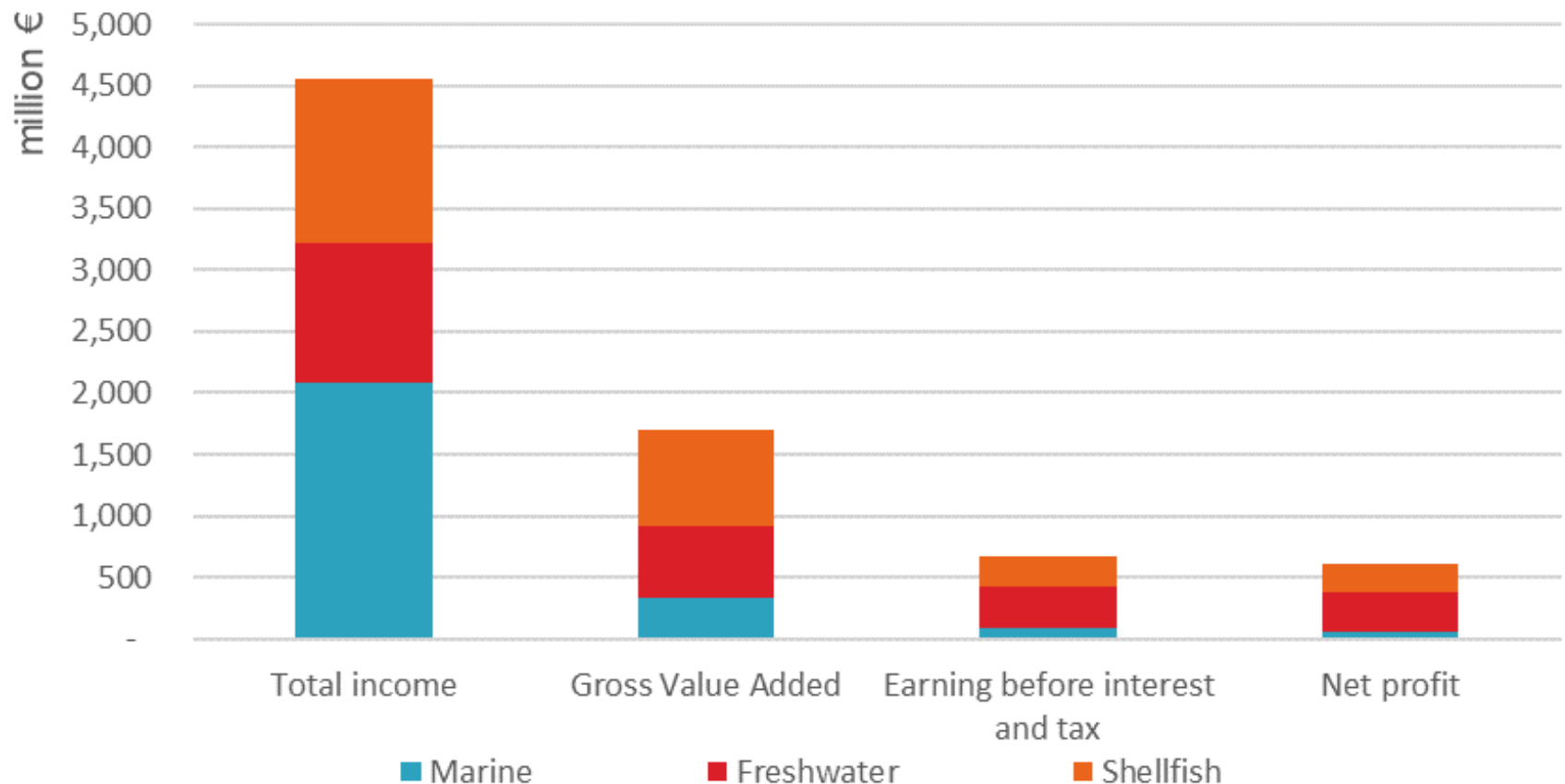
# Comparison of production by subsector (2018)

- We estimate production of 1.2 million tonnes and EUR 4.1 billion.
- Production is defined as first sales (not including stock changes).
- Our production weight is corrected (slightly underestimated) during the EWG. FAO values seem underestimated.



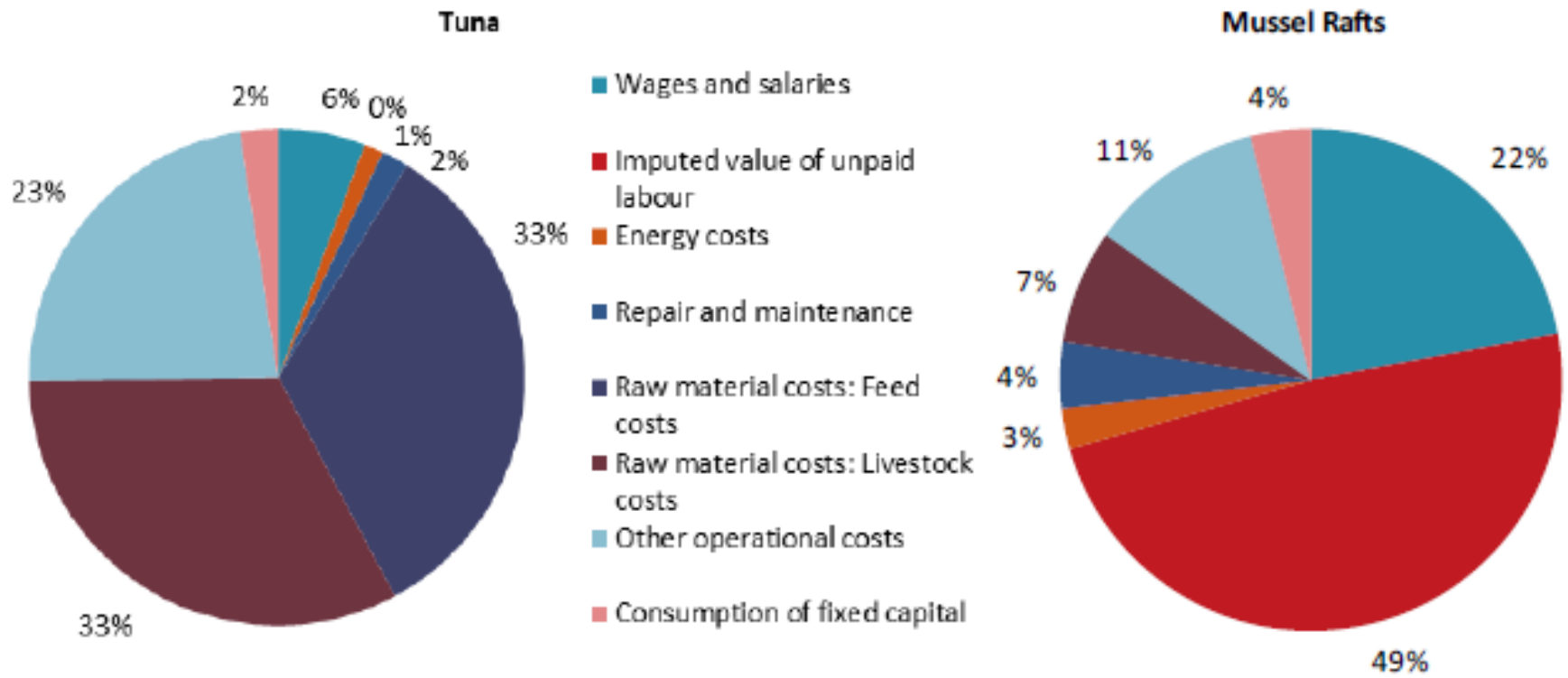
# Economic performance by subsector (2018)

- The report provides useful insights by subsector (marine, freshwater and shellfish aquaculture) ...



# Economic performance by subsector (2018)

- ... and by aquaculture segment (combination of main species cultured and culture technique).

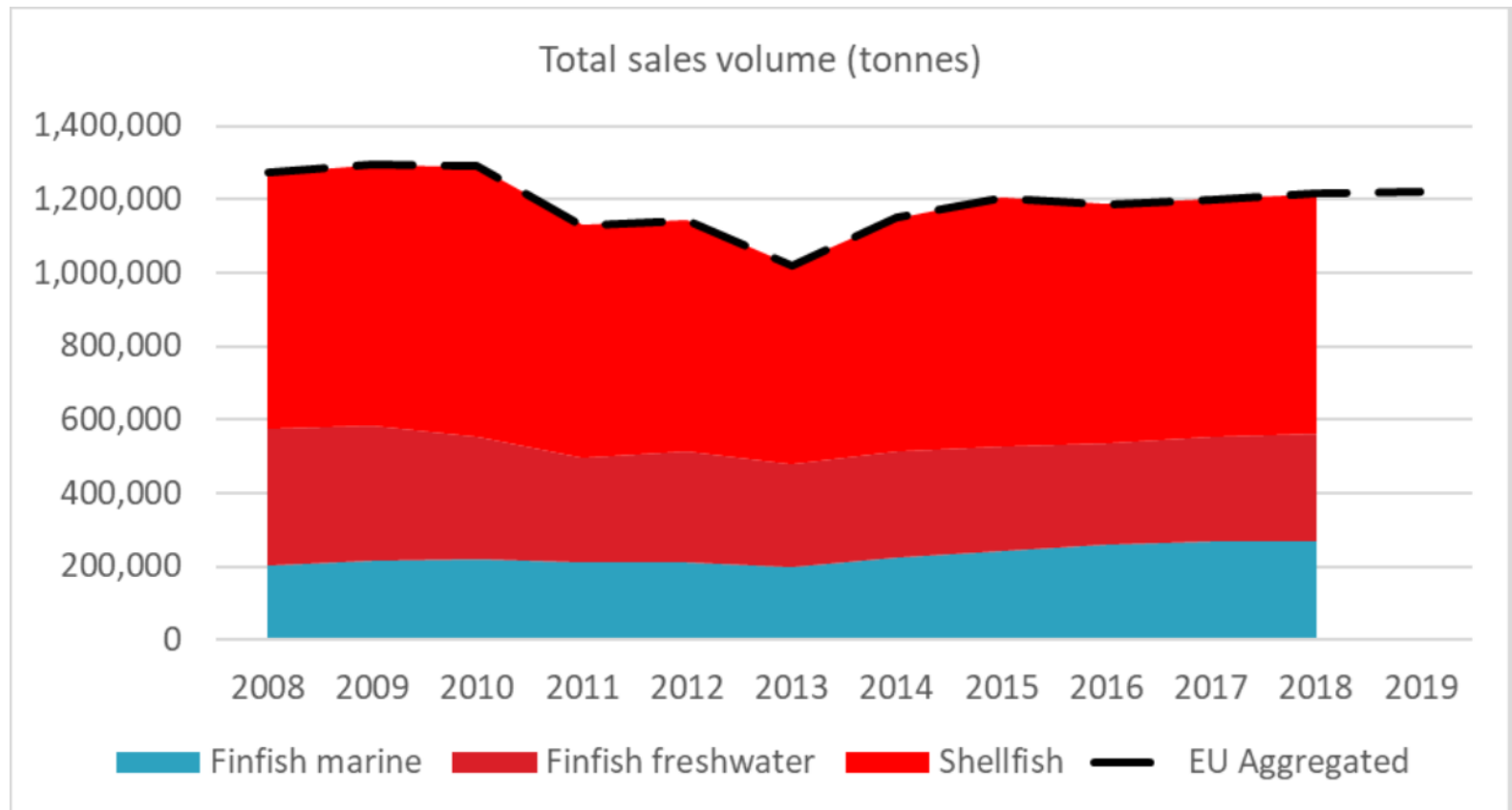






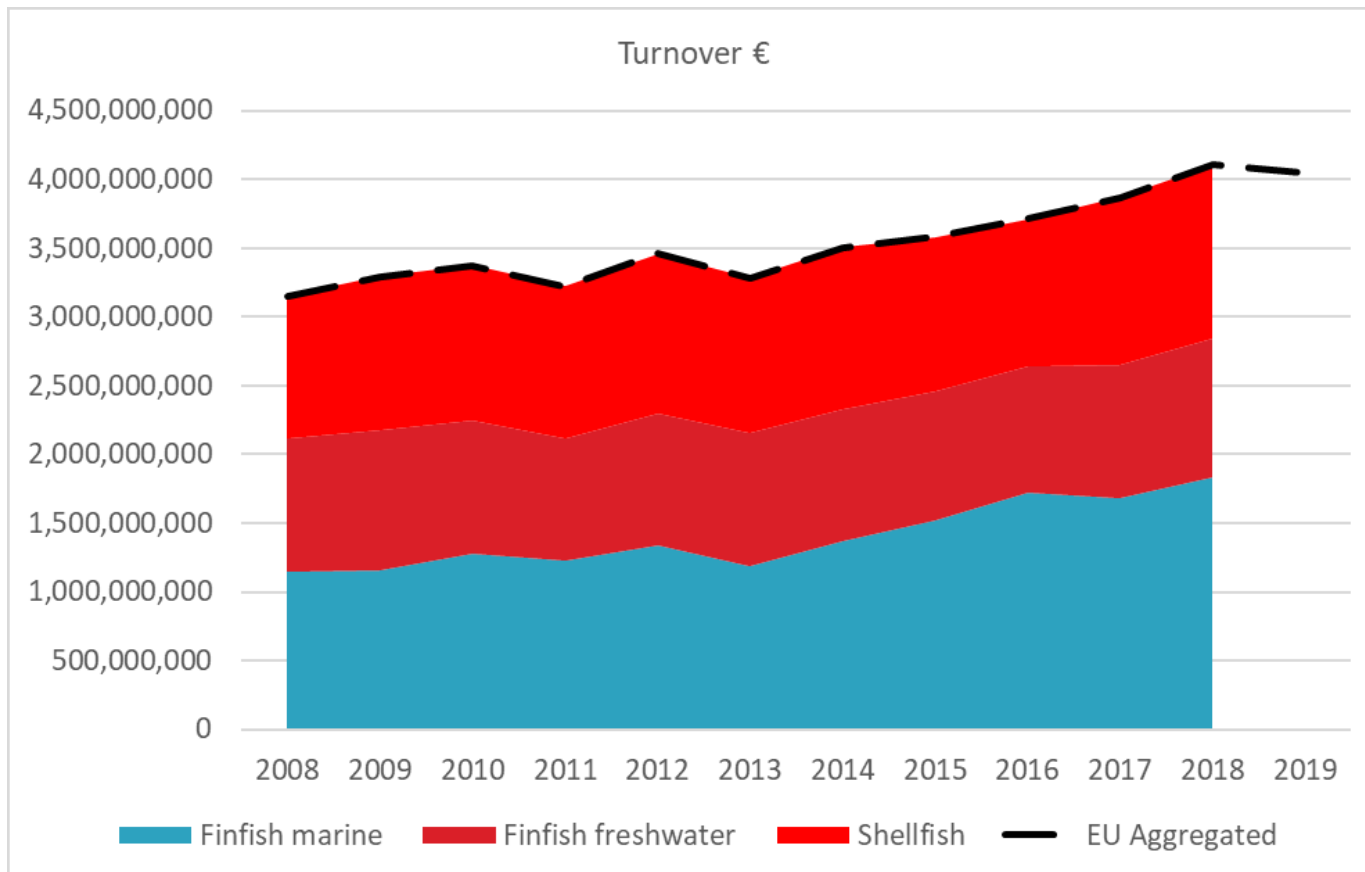
# Nowcasting (I)

- Some key variables were estimated for 2019.
- The EWG considered that could not provide a robust estimate for 2020.



# Nowcasting (II)

- The negative economic development observed in 2018 continues in 2019 and 2020.



# COVID-19 impact (2020)

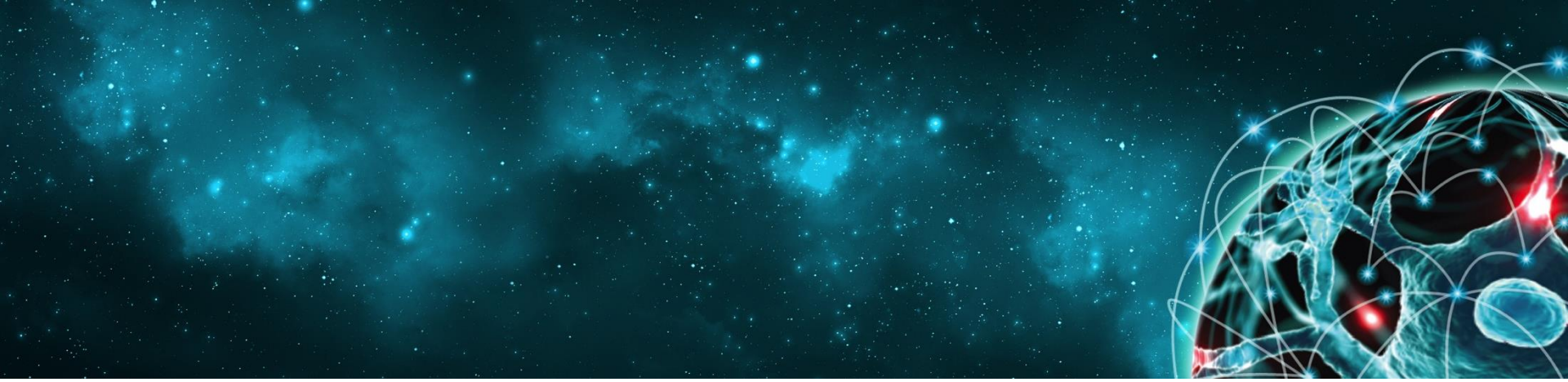
- Results show that sales volume is expected to decrease more than 10% and prices are expected to fall by almost 5% due to the disrupted supply lines caused by the COVID-19.
- Moreover, costs are increasing because fish/shellfish are kept longer in the aquaculture facilities to avoid losses.
- Together, these factors indicate an overall income loss in 2020 of about 10% for aquaculture farmers in the EU on average compared to 2019.
- According to the findings of the EWG, it seems that the employment was not significantly affected in 2020, in a short run perspective.

# Social (demographic) data (I)

- First time social data are collected and analysed!
- Social data can potentially contribute to the impact assessment analysis (e.g. some EMFF measures) and seafood industry issues such as gender equality, aging employees and support for young entries to the sector. They can also inform future education and mobility policies.
- The data covers gender, ages, education and nationality of the people employed in the EU aquaculture sector.

## Social (demographic) data (II)

- The results show that the persons employed in the sector are primarily male (76%) and that the age class 40-65 constitutes about 43% of total employment.
- The majority (83%) of people employed in the aquaculture sector are nationals of their own country, whereas the rest mainly comes from other EU countries.
- Education level shows large differences among Member States, the production technology used and production sectors.



# Thank you very much! Stay in touch!



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