Advice

STECF's Economic Report on the EU Aquaculture Sector (2025)

Brussels, 18 September 2025

1. Background

The Scientific, Technical and Economic Committee for Fisheries (STECF) publishes, every two years, the Economic Report on the EU Aquaculture Sector[1], which provides a comprehensive overview of the latest information on the production, economic value, structure and competitive performance of the aquaculture at the national and EU level. The next report is expected to include data for 2008 to 2024 and nowcasting for 2025.

The mentioned report is highly valued by the Aquaculture Advisory Council (AAC) and by the Market Advisory Council (MAC), as it contributes to the monitoring of the implementation of the Common Fisheries Policy (CFP), in line with Article 34 ("promoting sustainable aquaculture") of the CFP Regulation[2]. Ahead of the 2024 edition of the report, the MAC and the AAC adopted a joint recommendation calling for the inclusion of indicators of economic sustainability under the report[3], which the European Commission did account for in the corresponding Terms of Reference.

Through the present document, the AAC and the MAC would like to present their joint recommendations to the European Commission for the next edition of the report.

[1] The reports are made publicly available on the website of STECF.
[2] Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy
[3] AAC and MAC Recommendations for the inclusion of indicators of economic sustainability in the STECF's "The EU aquaculture sector report" (July 2023)

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2. Data collection

Following a call for economic data on the EU aquaculture sector, the Expert Working Group (EWG) of STECF will analyse and comment on the economic performance of the EU and national aquaculture sectors. In the context of the call, Member States must comply with EU legislation on data collection, including Commission implementing and delegated decisions. Member States may use the European Maritime, Fisheries and Aquaculture Fund (***EMFAF)*** to finance the collection and submission of data. In the view of the AAC and of the MAC, the use of EMFAF funding by Member States should be conditional on the submission of timely and valid data.

Presently, Member States can use different data collection strategies. The different approaches can impact the comparability and reliability of key indicators in the report, particularly in the context of the national chapters. This highlights the importance of data quality commentary. In the view of the AAC and the MAC, efforts should continue to harmonise ***data collection methodologies*** across the Member States. The data collection of data by the Member States could also be further streamlined, for example through a centralised and single exercise per year, simplifying the transmission of data to the office in charge of the Data Collection Framework. Additionally, efforts should continue to improve the coordination between the Commission and the Member States, while also strengthening, when relevant, the human and technical resources allocated to the national competent authorities to support the collection, procession and transmission of data.

The report acknowledges that a significant amount of data is transmitted late. In the view of the AAC and the MAC, the late transmitted data should be retroactively integrated into the analysis models from one year to the next, to improve the robustness and continuity of the time series. STECF should produce dynamic and evolving reports, incorporating the additional data (and, eventually, the corrected data) received after the closure of the annual exercise. Moreover, beyond the annual analysis, there should long-term analysis (10 to 20 years) to better indicate

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structural trends across the various segments of the sector. Additionally, STECF experts acknowledge the significant time dedicated to the verification and correction of the data submitted by Member States due to uneven quality or inadequate formats. Therefore, in the view of the AAC and the MAC, the Commission should adopt, based on the methodological recommendations issued by the experts, concrete measures to improve the initial quality of the transmitted data.

Table 10 ("economic variables in the aquaculture sector") of the Commission Delegated Decision 2021/1167[4] includes data on ***weight of sales*** and not data on production. As weight of sales is not equal to production, in the view of the AAC and of the MAC, the report should explain the difference between weight of sales and production and distinguish between "weight of sales" and "production" to avoid confusion and misinterpretations. Table 1 in the report presents the national developments in weight of sales from 2021 to 2022. Seven Member States report 2022 figures that have changed by more than 10%. As an example of a likely error, according to the 2024 edition, the weight of sales in Romania increased by 319% in comparison with the previous edition. In the view of the AAC and the MAC, when ***annual changes*** exceed a certain threshold, consulting Producer Organisations (PO) or other forms of farmers association would improve data validity and reliability.

Feed costs represent the largest operational expense for fed aquaculture. Feed markets are increasingly affected by global price volatility and supply constraints driven by geopolitical events and climate-related disruptions. Therefore, in the view of the AAC and the MAC, the report should include typical feed price trends by species and country as well as indicators of feed market risk. The report could also delve further into the interdependencies between fed aquaculture producers, feed producers and feed ingredient producers, for example through

[4] Commission Delegated Decision (EU) 2021/1167 of 27 April 2021 establishing the multiannual Union programme for the collection and management of biological, environmental, technical and socioeconomic data in the fisheries and aquaculture sectors from 2022

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input-output tables, economic multipliers, or references to the effects of feed supply chains on the development of the aquaculture sector.

3. Overview of EU sector

The report includes an overview of the EU sector, including comparison with the world production, economic performance (number of enterprises, production and sales, turnover, employment, mean wages, Gross Value Added, Earnings Before Interest and Taxes or Operating Profit, Return on Investment, labour productivity, capital productivity, average wage), and main species.

The report continuously uses the term "***seafood***", which does not accurately cover freshwater aquaculture, misrepresenting the aquaculture domain. In the view of the AAC and the MAC, in line with the Common Market Organisation (CMO) Regulation[5], the report should refer to "fishery and aquaculture products" / "aquaculture products" or, potentially, to "aquatic food".

The report provides a good overview of the ***molluscan shellfish farming segment***. Nevertheless, in the view of the AAC and of the MAC, there are opportunities to further strengthen the level of detail, particularly in the case of extensive systems and low trophic level farms. The annual area exploited could be expressed in linear metres for crops in the sector and in m² for other systems, allowing an assessment of the density of operations as well as a comparison of the evolution of the volumes produced with the areas mobilised. The share of the seaweed farming segment could be provided through the provision of specific data in a separate category. Additionally, information could be provided on co-culture systems, indicating the proportion of farms that combine several species (e.g., oysters and algae).

[5] Regulation (EU) No 1379/2013 of the European Parliament and of the Council of 11 December 2013 on the common organisation of the markets in fishery and aquaculture products

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Some ***categories of operating costs and economic losses*** are missing or underrepresented in the report. In the view of the AAC and the MAC, Member States should collect and submit data on predation-related costs, as these represent between 10% and 80% of operating costs, depending on the site and the year. The report should include the annual number of days of sanitary closures (e.g., norovirus), by species and by production area, to facilitate a more accurate estimate of the indirect economic impact, in particular on the gross margin and the viability of companies in the medium-term.

4. Structure of the EU sector

The report outlines the structure of the EU sector, including marine finfish aquaculture, shellfish aquaculture, freshwater aquaculture, and algae aquaculture.

The 2024 edition includes ***outlooks*** for mussels, clams, oysters and macroalgae but no outlook for the finfish sector. In the view of the AAC and the MAC, this omission creates a lack of balance and inconsistency in the presentation of the information, as the report could be read as a "recommendation" for an EU aquaculture sector based on shellfish and algae with 'no outlook' for the finfish sector. This could have negative outcomes for the strategic impact of the report, for example, if the report is taken into consideration to determine priorities, in the context of research funding and calls, by the Standing Committee on Agricultural Research (SCAR-Fish) or by the Commission's policy units. In the view of the AAC and of the MAC, all aquaculture sectors should be treated equitably.

Table 11 ("segmentation to be applied for the collection of aquaculture data") of the Commission Delegated Decision 2021/1167 does not include Recirculating Aquaculture Systems (RAS), Integrated Multi-Trophic Aquaculture (IMTA) or organic aquaculture. In the view of the AAC and the MAC, since these segments are promoted in the Commission's strategic guidelines for a more

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sustainable and competitive EU aquaculture[6] and in other Union policy documents on aquaculture, they should also be included in the report.

Table 11 includes "recirculation systems" defined as "systems where the water is reused after some form of treatment (e.g. filtering)" but this is not in line with the definition used in the strategic guidelines (fully controlled environment for fish, low water use, etc). The various definitions on RAS leads to ambiguous interpretations, complicating the collection of valid and reliable data on the development of RAS.

In accordance with the EU Algae Initiative[7], the EU aims for the sustainable growth and development of the ***seaweed farming sector***. In the view of the AAC and the MAC, the mentioned sector should be treated as a separate segment, facilitating a better identification of its economic, structural and technological specificities, and monitoring of developments. The metrics should be adapted and consistent with those of the shellfish farming segment.

5. National chapters

The report includes specific chapters for each EU Member State, including total production and sales, main species produced, industry structure, economic performance and employment, and outlooks.

At present, the report only refers to nominal prices. In the view of the AAC and of the MAC, for a better interpretation of the conclusions of the report, real prices should be used, as it would provide a more valid and relevant picture on the development of the economic variables.

6. Special chapters

[6] Communication from the European Commission, "Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 to 2030" (12 May 2021)
[7] European Commission, Communication "Towards a Strong and Sustainable EU Algae Sector" (15 November 2022)

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The report can include special chapters on specific topics.

Presently, the report does not include data and indicators on environmental and on animal welfare aspects. In the view of the AAC and of the MAC, this is a significant omission in the current monitoring of the evolution of the CFP.

In 2023, the European Court of Auditors (ECA) recommended enhancing the monitoring of ***environmental sustainability***[8]. In the view of the AAC and of the MAC, a first step to monitor environmental sustainability could be to introduce indicators on the emissions of total nitrogen and total phosphorus (kg emission/kg produced aquatic product), as the farming of all aquatic species leads to nutrient emissions (positive or negative) and as the indicators represent impacts of high environmental relevance and public interest. Data on emissions of nutrients are available from generic system-based nutrient emission models, or literature, or from national regulatory frameworks. The Commission's draft document on environmental performance includes examples from several Member States. Subsequent steps include other generic environmental indicators, for example emissions of greenhouse gases.

In the case of ***animal welfare***, preliminary indicators could, per example, include mortality rates and use of medicines and vaccines. Additional indicators could be selected from the document the Commission is currently developing on animal welfare indicators.

Sustainable aquaculture contributes to the environmental, climate resilience, and ecosystem objectives of various EU policies, such as the European Green Deal, the EU Strategy for Adaptation to Climate Change, the Water Framework Directive. In the view of the AAC and the MAC, it would be useful to develop an exploratory chapter on the ***interactions between aquaculture and the natural environment***, addressing, in particular environmental impacts of the activity (e.g., water quality, predation, diseases, pollution), and positive ecosystem services

[8] European Court of Auditors, Special report 25/2023: EU aquaculture policy

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provided. The chapter could address the effects of climate change, such as extreme temperatures, acidification, decreased salinity, and outbreaks of pathogens or toxins, that directly affect the productivity, resilience and economic viability of farms. The mentioned chapter would help determine the feasibility of developing, in the medium-term, a separate complementary report.

7. Publication

As the 2025 edition is based on 2022 data, there is a significant time lag in the publication of the information. In the view of the AAC and of the MAC, the Commission could establish an online platform for data collection to enable the publication of annual online interim reports presenting selected key data limited, per example, to table 1 and indicators on economic sustainability. The publication of more timely data would significantly increase the value of the data collection and could facilitate the publication of a 'leaner' report, ideally available in the EU's 24 official languages, improving the readability for aquaculture stakeholders. It is important to recall that the most recent editions count more than 300 pages and are only available in English.

8. Cooperation with stakeholders

Presently, aquaculture stakeholders and Advisory Councils, can participate as observers in the relevant STECF EWG. In the view of the AAC and the MAC, strong partnerships with the Advisory Councils as well as a better mobilisation of the EU Aquaculture Assistance Mechanism platform can contribute to improving the quality, consistency and representativeness of the data transmitted. Professional stakeholders can be encouraged to be further involved in the data reporting and validation processes, particularly those lacking data (e.g., sanitary closures, predation, mortality).

To facilitate direct feedback and the submission of field data from stakeholders, the European Commission could implement an interactive portal to allow the voluntary submission of

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anonymised data. The portal would have to be supervised by the national administrations, to guarantee the verification, structuring and interoperability of the reported data. As the EU Aquaculture Assistance Mechanism already serves a platform for interoperability and information sharing among stakeholders, it could serve as a basis for collection, aggregation, and dissemination of economic and technical data.

9. Recommendations

For the next edition of the Economic Report on the EU Aquaculture Sector, particularly the development of the Terms of Reference for the corresponding STECF EWG, the AAC and the MAC believe that the European Commission, with, when relevant, the appropriate involvement of STECF experts, should:

a) In the context of data collection, ensure that the use of EMFAF funding by Member States is conditional on the submission of timely and valid data, while continuing to incentivise the improvement and harmonisation of data collection methodologies across Member States;
b) Explain, in the report, the difference between “weight of sales” and “production” and distinguish the two concepts;
c) When annual changes in indicators exceed 10% in variation, ensure that Member States consult the relevant POs and aquaculture farmer associations to determine the reasoning;
d) Include typical feed price trends by species and countries as well as indicators of feed market risks;
e) Instead of the term “seafood”, refer to, in line with the CMO Regulation, “fishery and aquaculture products” / “aquaculture products”, or, potentially, to “aquatic food”;
f) Include “outlooks” for all segments of the EU aquaculture sector (i.e., marine finfish aquaculture, shellfish aquaculture, freshwater aquaculture, and algae aquaculture);

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g) Introduce a clear definition of “RAS” and include data on the RAS, IMTA, cocultures, and organic segments;
h) Differentiate the seaweed farming sector as a separate segment within aquaculture;
i) Include additional categories of operating costs and economic losses, such as predation, and sanitary closures;
j) Instead of only referring to nominal prices, use also real prices;
k) As special chapters, introduce indicators on environmental sustainability and on animal welfare, plus an exploratory chapter on the interactions between aquaculture and the natural environment;
l) In line with the 2024 edition, continue to include indicators on the economic sustainability;
m) Publish, every year, a selection of key data via an online platform;
n) Maintain a strong involvement of the aquaculture stakeholders, including the relevant Advisory Councils, the EU Aquaculture Assistance Mechanism, and professional organisations, including through the development of an interactive portal for voluntary submissions.

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