

Development of an English Aquaculture Strategy

Presentation to the South West Aquaculture Network
21st July 2020

Current Status of English Aquaculture

The figures



- Production volumes declining at 5% per annum, with the value static
- Currently dominated by rainbow trout (c. 60%) and mussels (20%)
- But detailed statistics on English aquaculture production and economics are lacking



Current Status of English Aquaculture

Current status

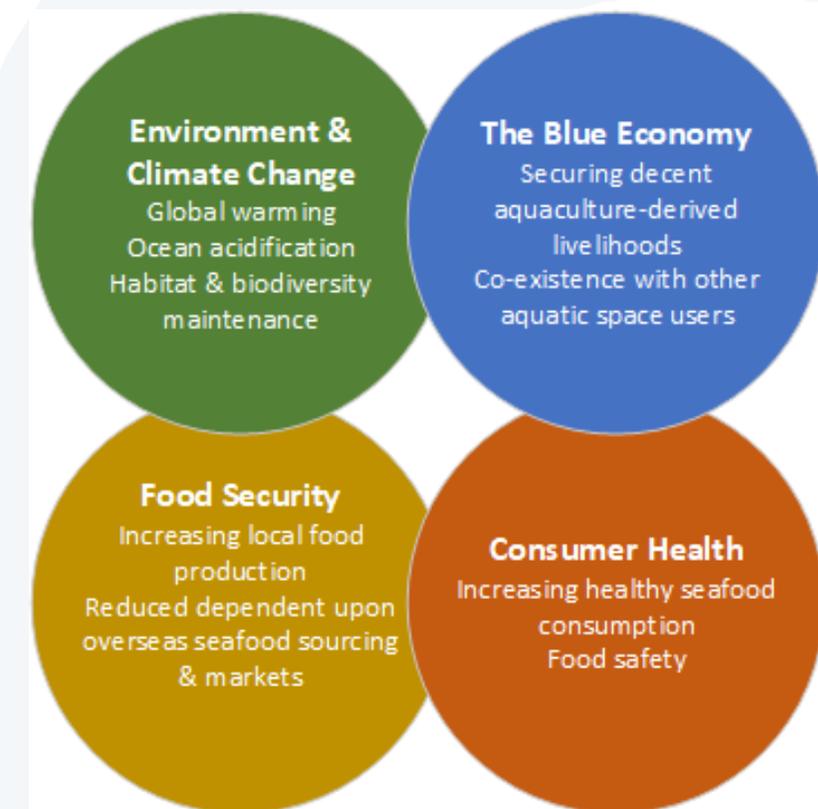
- England's 8,000 mt aquaculture production (worth £23 million) compares to 93,000 mt in English capture fisheries (worth £209 million). Scotland's aquaculture produced around 190,000 mt in 2019, with an economic contribution of around £1.8 billion.
- But English aquaculture is important in terms of:
 - Livelihood opportunities, many of which are SME-based in economically-deprived areas.
 - Serves niche, often high value markets that capture fisheries cannot meet.
 - Unlike finite capture fisheries, has the potential to substantially expand and diversify.
 - Can also contribute to supplying warm-water species to reduce our dependence upon imported seafood.
- So why has English aquaculture not flourished, esp. given Scotland's success?
 - Lack of strategic direction.
 - Competition for space and resources in a densely populated country with largely shallow, heavily utilised sea areas.
 - Limited government support due to it's small size and the focus on capture fisheries.
 - A slow pace and drive for technical innovation, despite having some of the best universities and research minds in the world.



Current Status of English Aquaculture

The way forward

- For a number of reasons we are now at a watershed for English aquaculture, including:
 - The **SF2040 framework**, inc. the formation of the ALG.
 - **Emerging technologies** that could revolutionise aquaculture in English waters e.g. semi-closed mariculture, recirculating aquaculture systems (RAS), integrated multi-trophic aquaculture (IMTA), etc.
 - **Brexit** – for better or worse, this is set to substantially change seafood supply chains into - and out of - the UK for some years to come.
 - **COVID-19** - another game changer which demonstrates our vulnerability and dependence upon global supply chains.
 - **Climate change** – food production needs to adapt to a changing environment and contribute to meeting our carbon reduction targets.
- In summary, there is an opportunity for this strategy to encourage a major change in English aquaculture's contribution to national seafood production, food security and nutritional health.
- But this will require courage, ambition and a firm government commitment to be realised.....



Scope of the EAS

What is included and what is out of scope?

Geography: The Strategy will cover all of England, inc. the Isles of Scilly and the Isle of Wight.

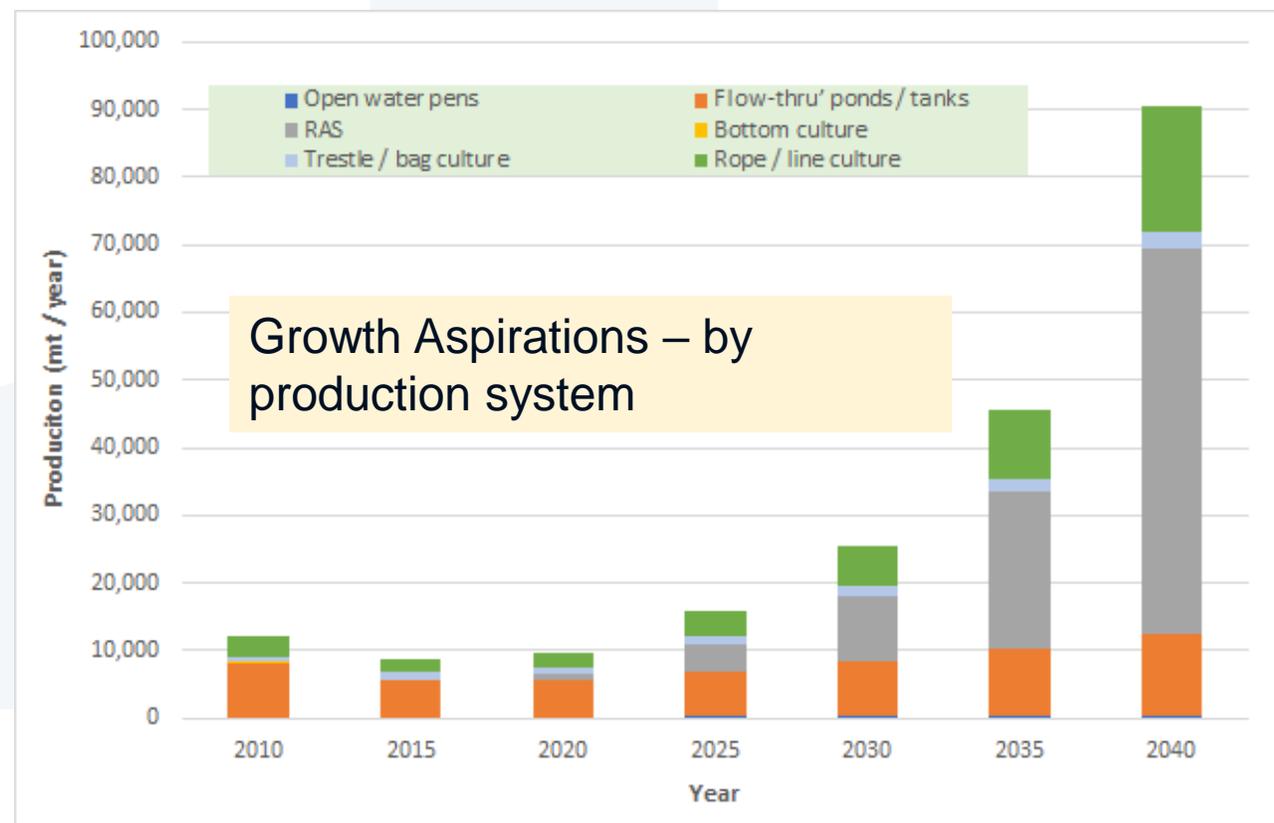
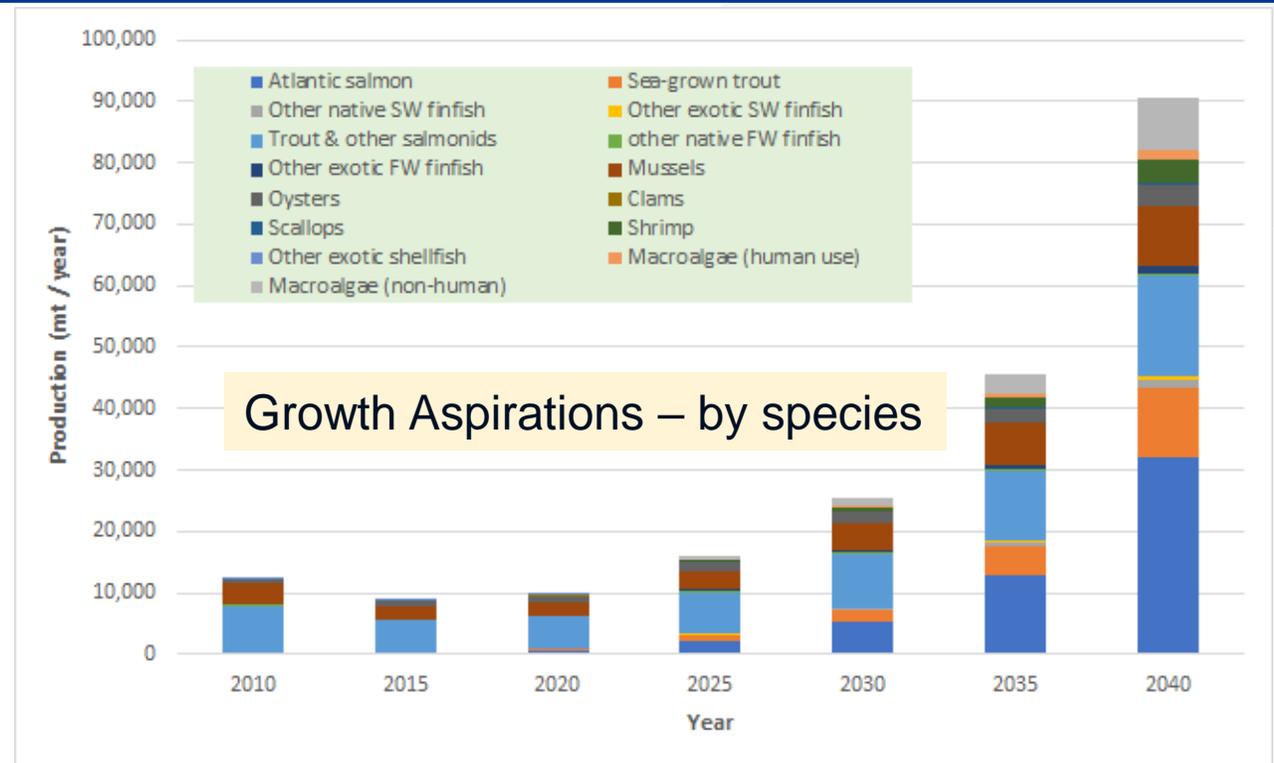
Environment: The Strategy will cover aquaculture in *freshwater, transitional waters* and *sea water* out to England's jurisdictional limits.

Species: The Strategy is predominantly focused on aquatic animals and plants for human consumption. It will therefore include:

- finfish, molluscs and crustaceans.
- the farming of macroalgae for both human-consumption and non-human use.
- microalgae, invertebrates and other species where they have an important role in an aquaculture system, such as a feed input.

Timing: The Strategy will be established for a twenty year time period from 2020 to 2040.

Please note growth aspirations are preliminary and should not be quoted.



The Strategy

Fundamentals

- Built around the framework of the SF2040 and its recommendations
- Needs to reflect Government policy in terms of seafood production, food security, nutritional health and climate change.
- Is more than just a Strategy – it will need to include a Delivery Plan that identified short, medium and long-term activities and milestones.
- Needs to energise a strong political mandate and support for sustainable growth in English aquaculture.

1. BACKGROUND, OBJECTIVES AND APPROACH

1.1 BACKGROUND

1.2 OBJECTIVES OF THE ENGLISH AQUACULTURE STRATEGY

1.2.1 *Background*

1.2.2 *The Objective of the English Aquaculture Strategy*

1.3 SCOPE AND METHODOLOGY

1.3.1 *Scope*

1.3.2 *Methodology*

2. POLICY AND STRATEGIC FRAMEWORK

2.1 THE POLICY ENVIRONMENT FOR ENGLISH AQUACULTURE

2.1.1 *Sustainable Development Goals*

2.1.2 *The Blue Economy*

2.1.3 *Food Security*

2.1.4 *Consumer Health*

2.1.5 *Climate Change*

2.1.6 *Summary of the Policy Framework for English Aquaculture*

2.2 STRATEGIC VISION AND OBJECTIVES

2.3 TIMELINE AND IMPLEMENTATION

3. STRATEGIC ACTIONS

3.1 SECTORAL ELEMENTS

3.1.1 *Marine Finfish*

3.1.2 *Freshwater finfish*

3.1.3 *Shellfish*

3.1.4 *Macroalgae*

3.2 CROSS-CUTTING ELEMENTS

3.2.1 *Governance and Regulation*

3.2.2 *Knowledge, Innovation and Technology*

3.2.3 *Common Infrastructure Development*

3.2.4 *Financial Support*

3.2.5 *Human Capacity Development*

3.2.6 *Promoting Aquaculture as a Critical and Sustainable Pillar of the Blue Economy*





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