2024 OCTOBER

Manifesto for the Sustainable Development of the European Shellfish Sector

A.E.P.M. ~ E.M.P.A.

The European Mollusc Producers Association (E.M.P.A.) brings together national or regional associations and bodies representing mollusc producers within the European Union.

With members from six European Countries, - Spain, France, the United Kingdom, the Netherlands, Italy and Ireland - the E.M.P.A. plays a crucial role in the European shellfish industry, representing 90% of the companies or operators involved in the production and marketing of shellfish in Europe. The EMPA is currently chaired by Mr Addy Risseeuw from the Netherland Producers Association.

Mollusc production is the largest segment of aquaculture in the EU, with an annual production of over 500 million tonnes. At European level, the shellfish production sector represents an annual production worth 1170 million euros, and more than 50% of aquaculture production. However, this key player in the aquaculture industry has been in steady decline for 20 years.

The EMPA is a member of the Aquaculture Advisory Council (AAC) and the Market Advisory Council (MAC).

Our recommendations for the 2024-2029 European mandate are the following:

1. Acknowledge the role of shellfish farming in reinforcing Europe's food sustainability, safety, sovereignty and nutrition

Shellfish are a healthy source of protein with a low or even negative carbon footprint and remarkable nutritional qualities.
While 70% of seafood consumed in the EU is imported, molluscs and macro-algae are the species groups with the greatest potential to increase sustainable seafood production in the EU and to help diversifying the sources of proteins consumed by Europeans. The development of aquaculture and in particular that of shellfish farming, if it is adequately and effectively enabled, could greatly contribute not only to a more sustainable European food production, but also to the EU's food security and sovereignty.

We therefore ask the EU and its Member States to:
- Define European growth targets for shellfish production, including for the organic production.
- Encourage sustainability certification schemes and labels for products.
- Promote the consumption of aquaculture products, especially among young Europeans.

2. Triple the area allocated to shellfish farming to increase the production and the associated environmental and economic benefits

As part of its Strategic Orientations for Aquaculture, the EU has set an ambition for a significant increase in aquaculture production, particularly of the organic production. In order to produce more, it is essential to grant more space to shellfish farming in coastal areas, as part of an integrated land-sea approach encompassing the environmental, economic and social parameters of its development and coexistence with other maritime activities. Shellfish farming is compatible with, and can even contribute to, the objectives of protecting and restoring marine ecosystems. It can also be developed in co-location and co-use of the maritime space with many other activities.
The development of shellfish farming offshore is also a strategic challenge for the sector's future. The foundations for the co-location and co-use, including with offshore wind farms, of integrated multi-trophic aquaculture systems must be laid today.

We therefore call on the EU and its Member States to:
- Urgently simplify the administrative framework for licensing procedures and speed up the granting of new licenses both in coastal and offshore areas.
- Establish a binding and quantified 2030 and 2050 European targets for coastal space allocated to shellfish farming.
- Strengthen the land-sea interactions in measures taken towards achieving environmental objectives in the framework of maritime spatial planning.
- Include co-use criteria in offshore wind energy calls for tenders.
- Promote in depth studies on the possible profitability and economic implications of shellfish farming associated with wind fields.

3. Leverage the development of shellfish farming to accelerate water quality improvement

Shellfish farming is intrinsically dependent on the quality of the environment in which it takes place. A rapid improvement in shellfish waters quality is essential for the survival of shellfish farming today, but also for its future development. The conservation and preservation of water nutrients levels similar to the historical ones is equally essential. The objective of allocating more space to shellfish farming must be combined with operational means to improve the chemical, biological and microbiological quality of water in the production areas, through an integrated approach from river basins to marine waters, taking into account the impacts of climate change. The shellfish sector is a true ally of the EU in achieving its objectives in terms of water quality and protection of aquatic ecosystems.

Strengthening the land-sea interactions, particularly in the governance of coastal areas is essential to achieve good ecological status of transitional and coastal waters, and therefore of shellfish production areas. Maritime and environmental stakeholders must be able to influence decisions taken further upstream, on land.

To improve the quality and suitability of shellfish waters, we ask the EU to:
- Adopt a specific Directive on the quality of shellfish waters, establishing environmental objectives and indicators specific to the needs of shellfish production, including the organic production. Such Directive should be basin-tailored to preserve local specificities.
- Strengthen the implementation and enforcement of the Water Framework Directive (WFD) and achieve good environmental status for transitional and coastal waters by 2027.
- Strengthen the Marine Strategy Framework Directive (MSFD) and its implementation by using shellfish health as an indicator of the good marine environment quality.
- Strictly monitor the implementation of the afford mentioned WFD and MSFD, avoiding other stakeholders to adopt reference parameters unsuitable for traditional shellfish farming activities and in contrast with historical features of the considered bassins.
- Encourage the creation of coastal areas governance models involving appropriate maritime and environmental stakeholders, which can oppose terrestrial management decisions taken upstream of coastal watersheds.
- Implement the "polluter pays" principle fully in regard to water quality so that shellfish producers are able to be compensated by the businesses that pollute our production waters.

4. Recognise the "Ecosystem services" provided by shellfish farming activities in support of the EU's environmental and climate goals

Shellfish farming provides numerous "Ecosystem services" (water clarification, nitrate and carbon absorptions, habitat creation for other marine species, limiting the risk of algal blooms, conservation of wild shellfish, etc.) which are widely recognised by the scientific community, but not yet fully integrated into public policies.
The recognition of these "Ecosystem services", through the introduction of certification systems and compensatory payments for producers, is an essential lever if this production is to play a full part in the transition towards more sustainable food systems and in meeting the challenges of the twin biodiversity - climate crises.

We therefore call on the EU and its Members States to:
- Define environmental performance indicators for shellfish production.
- Establish standards for the footprint assessment, with particular regard to LCA (Life Cycle Assessment) methodologies.
- Establish standards for the certification of nitrate absorption and carbon sequestration by farmed shellfish.
- Include shellfish farming in measures that contribute to restore marine ecosystems as "Others Effective area-based Conservation Measures (4th Convention on biodiversity 2018).

5. Create a Common Aquaculture Policy

A clear European vision and defined objectives are essential if shellfish farming, and aquaculture in general, are to fully meet the challenges of food safety, sustainability and sovereignty. In the context of the current open method of coordination, the aquaculture remains only a potential solution to these many challenges at European level, without robust foundations commensurate with the challenges ahead. Consequently, after two decades from the first European strategy for the development of a sustainable aquaculture, the EU has not managed to get aquaculture production off the ground in any significant way and to increase Europe's self-sufficiency in aquatic food products. While environmental, agricultural and energy objectives are clearly set out in binding policies and legislative frameworks, the EU lacks a Common Aquaculture Policy to provide the necessary coordination, coherence and political impetus at the European level.

We therefore ask the EU and its Member States to:
- We therefore ask the EU and its Member States to introduce a Common Aquaculture Policy.
- We encourage the EU and its Members to define clear objectives on the development of Low trophic level Aquaculture.

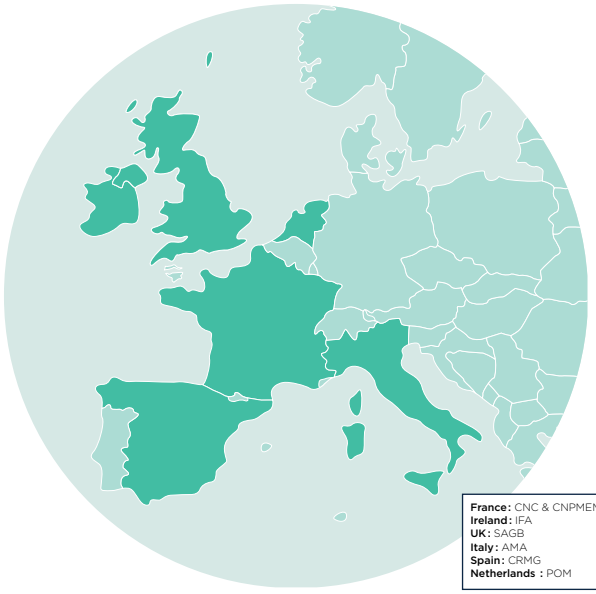
What is shellfish farming?

Shellfish farming is a form of aquaculture that consists in rearing molluscs such as oysters, mussels, cockles, clams, etc. in open marine environments, in the intertidal zone, in lagoons, in shallow waters and offshore.

As emphasized in the "Strategic guidelines for a more sustainable and competitive European Union aquaculture for the period 2021 to 2030", shellfish farming is a sector with a promising future for food production, offering solutions to many environmental and climate challenges. This type of aquaculture is 100% natural, with no feeding or medication, and provides several ecosystem services such as reducing water turbidity and eutrophication through its filtration, absorbing nitrogen which limits the risk of algal bloom, habitats creation and local biodiversity increase, as well as carbon sequestration. Shellfish are true sentinels of the good environmental status of coastal and marine waters, while being a source of protein and important trace nutrients with high nutritional value. Committed to greater circularity, the shellfish farming sector also increasingly offers new solutions such as alternative bio-sourced shell-based materials for multiple applications such as construction.

The cultivation and consumption of shellfish is part of the cultural heritage of many European coastal and rural regions, where it opens up remarkable prospects for economic development in often deprived coastal communities.

EMPA Members



France: CNC & CNPMEM
Ireland: IFA
UK: SAGB
Italy: AMA
Spain: CRMG
Netherlands : POM

Key Figures

€ 1,17 Mrd
OUT OF 2.993 MILLIARD
TOTAL PRODUCTION VALUE

€ 44.7 M
EBIT

17,5 %
ROI

6,183
NUMBER OF ENTERPRISES
(47% of European aquaculture companies)

108,000 €
LABOUR PRODUCTIVITY

64,500 €
CAPITAL PRODUCTIVITY

584,000 T
TOTAL PRODUCTION VOLUME (TONS)
OUT OF 1,157,000 T EUROPEAN AQUACULTURE

40,620
NUMBER OF WORKERS IN THE MS AQUACULTURE SECTOR IN 2020
(shellfish farmers = 51%)

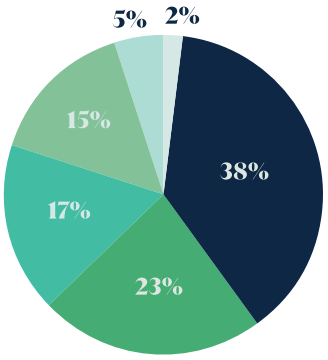
€ 1,051 Mrd
TURN OVER
30% OF AQUACULTURE

Shellfish and seaweed aquaculture have exceptionally low carbon footprints

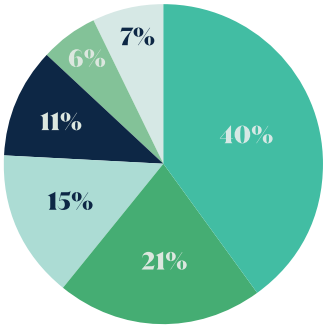
107 kg (CO2 EQ./TONNE) **ROPE GROWN MUSSEL**	VS	**~ 27,000 kg** (CO2 EQ./TONNE) **BEEF**
235 kg (CO2 EQ./TONNE) **OYSTER**		**~ 1,500 kg** (CO2 EQ./TONNE) **CHICKEN**
824 kg (CO2 EQ./TONNE) **BOTTOM GROWN MUSSEL**		**~ 6,000 kg** (CO2 EQ./TONNE) **FARMED FISH**

COMPOSITION OF THE MAIN SHELLFISH SPECIES
PRODUCED BY THE EU AQUACULTURE SECTOR (2020)

WEIGHT



VALUE



- Sea mussels nei
- Blue mussel
- Pacific cupped oyster
- Mediterranean mussel
- Japonese carpet shell
- Other

Sources: STECF 2022 & BIM. Seafood Carbon Report 2023.

European shellfish farming is therefore a promising sector, offering solutions that the European Union (EU) has every interest in supporting.

A.E.P.M. ~ E.M.P.A.

E.M.P.A
84 Amsterdam Street • 75009 Paris
+33 (0)7 49 67 75 39 • coquillages.com/europe/aepm/
t.pivetta@cnc-france.com