

Fresh Water Aquaculture

- Introduction to the Fishbowl Session -

SUFISA final conference, 19 March 2019

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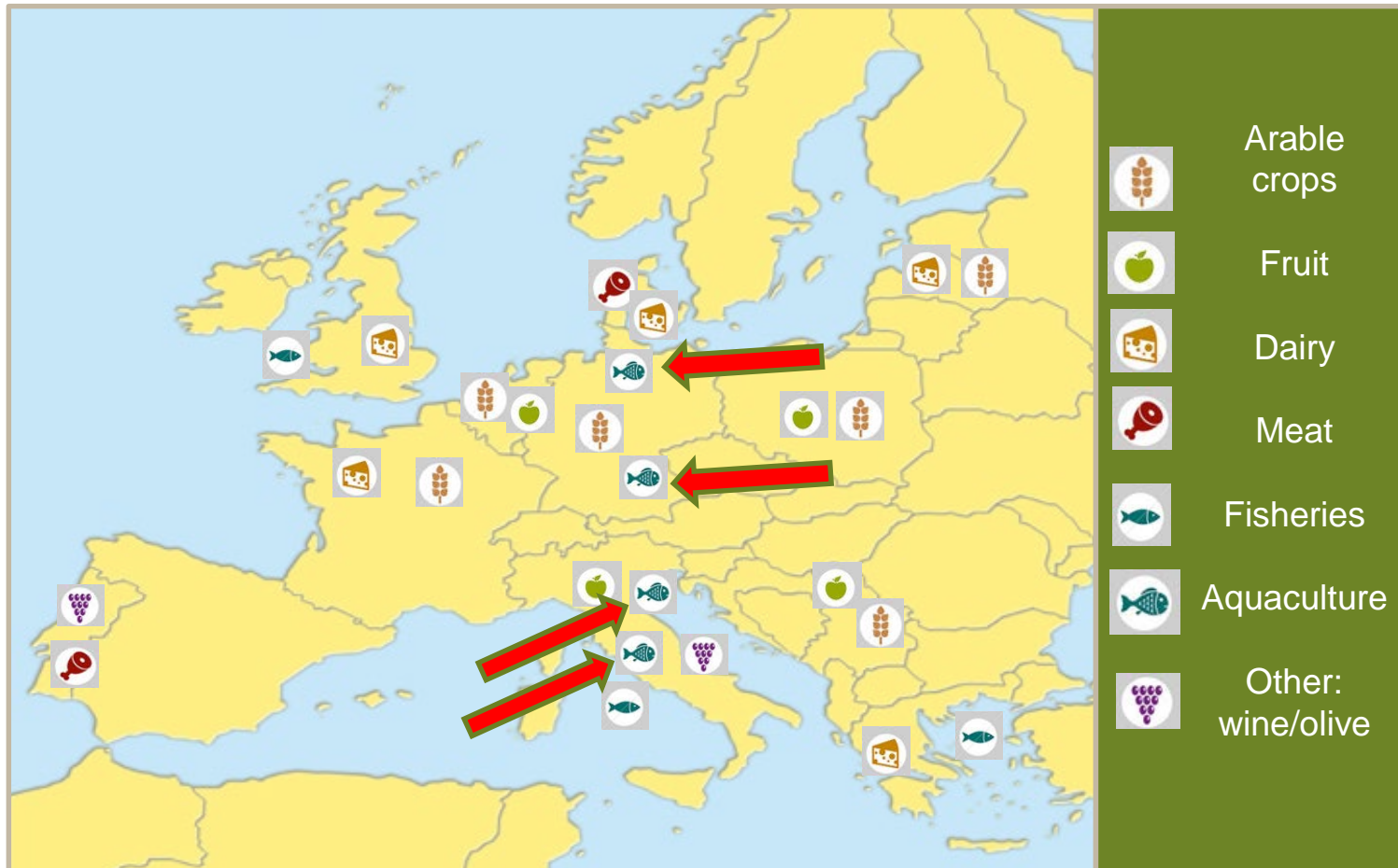
This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 635188. This presentation shows the vision of the authors not of the European Commission.



Background

- The term aquaculture covers a variety of production systems:
 - Saline fish (seafood, algae) production – marine and onshore
 - Sweet water/inland fish production in natural ponds, artificial run-through ponds or in cold or warm water Recirculation Aquaculture Systems (RAS)
- Aquaculture is the global food industry's fastest growing sector.
- Approximately 90% of global aquaculture production is in Asia.
- There is a considerable scope to develop Europe's aquaculture.
- The European Commission and EU Member States aim to enhance aquaculture production throughout Europe.
- Aquaculture is likely to become increasingly important in light of global food security, the development of a more 'sustainable diet' and the achievement of the UN Sustainable Development Goals.

SUFISA aquaculture case studies



Key findings from Tuscany

- **Capital-intensive semi-industrial or industrial businesses**
- Supplying **supermarkets** and large wholesalers
- Strong **competition** from **low cost markets** (e.g. Greece)



Key findings (2)



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- Targeting **high quality standards** (high quality inputs and services for/in coordination with retailers)
- International standards (**ISO**), transnational **sustainability** certification (Friends of the Sea) or own **brands**
- Strong **vertical coordination (business to business)**
- **Administrative limitations** for expanding at sea



Major challenges

- **Renewal of marketing/coordination strategies vis-à-vis** international increasing low cost competition
- **Organic fish farming, now?** It was tested in Tuscany 10 years ago but the market did not respond.
- **A policy-driven regional brand?** Not really working since 15 years: top down, not considering value chain coordination dynamics, less efficient than existing private labels.
- **Expanding ponds at sea?**
Authorisations depend on state protection of natural sites; and uncertainty of local policies



Key findings – RAS in Germany

- Very limited number of recircular aquaculture plants
- Scattered all over Germany – very limited cooperation
- Investors come from agriculture or from non-food sectors
- Several innovative/pilot plants encountered difficulties or failure

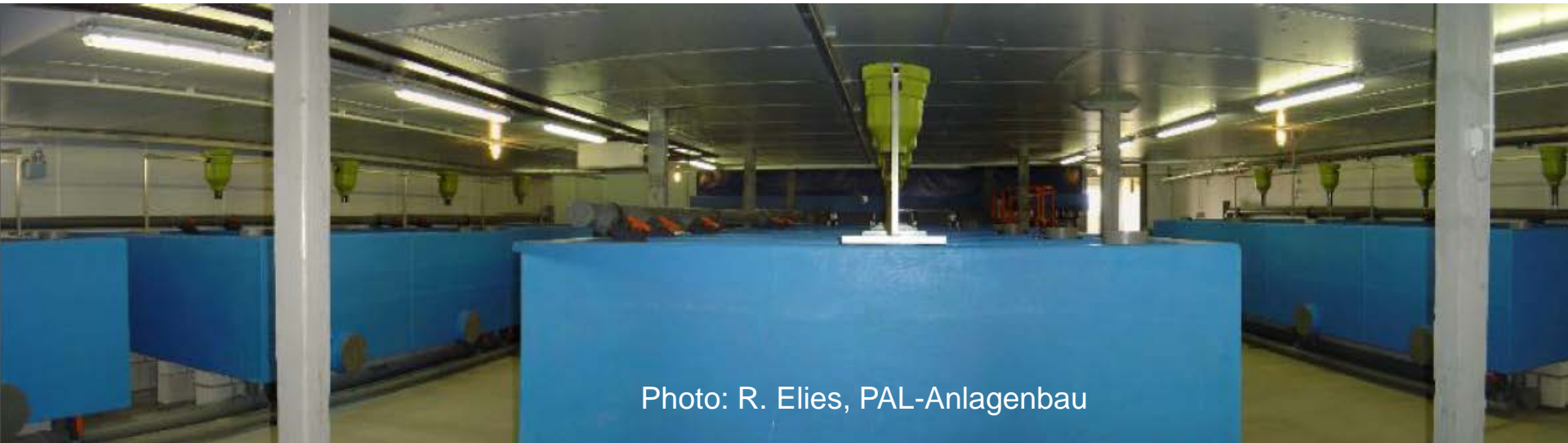


Photo: R. Elies, PAL-Anlagenbau

Major challenges for RAS businesses



Photo: R. Elies, PAL-Anlagenbau

- Authorisation procedures for new investments
- Very limited access to water rights
- Fish breeding technologies – research needs
- Bad image of aquaculture in the society – an EU wide phenomenon
- Difficult recruitment of qualified staff
- Combination of technological expertise and knowledge about markets and marketing
- Values-based sales / marketing

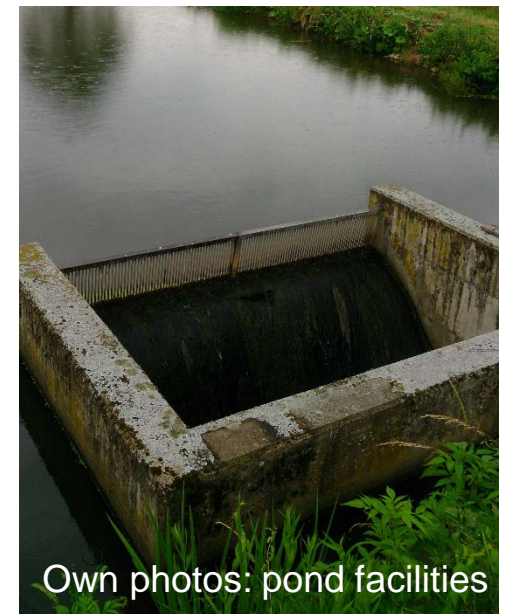
Traditional carp farming – ponds in a row without flowing water



Own photo: Three ponds in the Aischgrund, Middle Franconia



Own photos: Mowing stripes in Natura 2000 area



Own photos: pond facilities

Keeping live carp after the harvest



Own photos: Tanks in the old times (Carp museum Neustadt) and today

Carp represents the regional identity of the Aisch valley



Key findings - traditional carp farming in Frankonia

- Earthen carp ponds date back to the development of cloisters all over Europe, and represent high nature value ecosystems!
- In Frankonia, (agricultural) families farm their own carp ponds.
- Carp dishes are a local and seasonal speciality (Sept. - April)
- Farmers cooperate closely for water management in pond cooperatives.
- Some farmers cooperate with local gastronomy/regional tourism for fresh carp delivery. PGO: Aischgründer carp
- Many farmers sell fish to fish traders competing with Czech and Polish carp producers (low price sales).
- Regional and cultural identity: carp and pond landscape

Major challenges for carp farmers

- Predator birds cause the risk of significant losses (up to 60%)
- Low margins due to increasing costs and stagnating sales prices
- Natura-2000 payments are limited to a) the grassland/dykes around ponds, and b) small conservation areas.
No agri-environmental schemes for traditional carp farming, which farmers compared with traditional alpine dairy systems
- Younger generation will only take over engagement in the part-time business when carp farming is profitable.
- Values-based sales / marketing

Fishbowl discussion

- How to **increase awareness and improve the image** of modern aquaculture practices at all levels, including regulators and consumers?
- How to **enhance marketing and cooperation** amongst producers, in order to **add value to the fish** produced and increase the demand for aquaculture-produced fish?
- How to **increase the capacity of aquaculture** within Europe to make a more significant contribution to the achievement of food security, at both a European and global level?

Participants

- Carl-Christian Schmidt, Expert Board of Sufisa, Paris
- Grażyna Bałys-Diprose, Public relations, LAG Dolina Karpia, Zator, Polen
- Kamil Olejczyk, EU funding and administration, LAG Dolina Karpia, Zator, Polen
- Susanne v. Münchhausen, SUFISA case studies ‚Aquaculture‘, HNE Eberswalde, Germany (facilitator of the discussion)

Thank you!



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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 635188.

