



European Organic Aquaculture

www.oraqua.eu

**Science-based recommendations
for further development of the EU regulatory framework
and to underpin future growth in the sector**

**Coordination and support action
2014-2016**

(Project Coordination: Asa.Espmark, Nofima)





Overall objective

Recommendations for a new EU ‘organic’ regulation,

- **Based on the current scientific knowledge,**
- **In line with the basic ‘organic’ principles,**
- **Contributing to consumer confidence**

→ to promote the growth of the organic sector in Europe.



Evolution of the regulation

Recommendations are elaborated by an expert group:
Expert Group for Technical Advice on Organic Production (**EGTOP**)

- **First report in December 2013,**
- **Second report in July 2014,**
- **Several amendments since 2013.**

- **Last amendments recently adopted by the commission:**

19.12.2014

EN

Official Journal of the European Union

L 365/97

COMMISSION IMPLEMENTING REGULATION (EU) No 1358/2014

End of the Oraqua project: December 2016.





The partners

1. Nofima, Norway
2. COISPA, Italy
3. DTU, Denmark
4. Ifremer, France
5. USB, Czech Republik
6. SLU, Sweden
7. DLO/IMARES, Netherlands
8. ICROFS, Denmark
9. IZSve, Italy
10. Debio Association, Norway
11. ICEA, Italy
12. FEAP, Belgium
13. API, Italy
14. Culmarex SA, Spain





Objective and methods

The new organic regulation concerns the main aquaculture productions (**fish, mollusks, shellfish and algae**), and has to be based on:

- The most recent scientific knowledge:
 - **Synthesis of the relevant peer review and grey literature**
- Information from the interactions between the project consortium, the main actors of the aquaculture sector and the consumers using:
 - **An open dialog with stakeholders through meetings in a multi-stakeholder platform (balanced in terms of nationalities and of types of stakeholders),**
 - **Collection of information through surveys,**
 - **The project website: www.oraqua.eu and dissemination documents.**



Gathering of scientific knowledge

- **Information on production**
 - Feed and nutrition
 - Health, welfare, biosecurity and veterinary treatments
 - Production systems and their management
 - Interactions with the environment
- **Information on Socio-economy**
 - Consumer perception and confidence issues
 - Competitiveness of organic products in the EU market
 - Analysis of institutional and regulation constraints
 - Analysis of socio-economic constraints



Interactions with the society

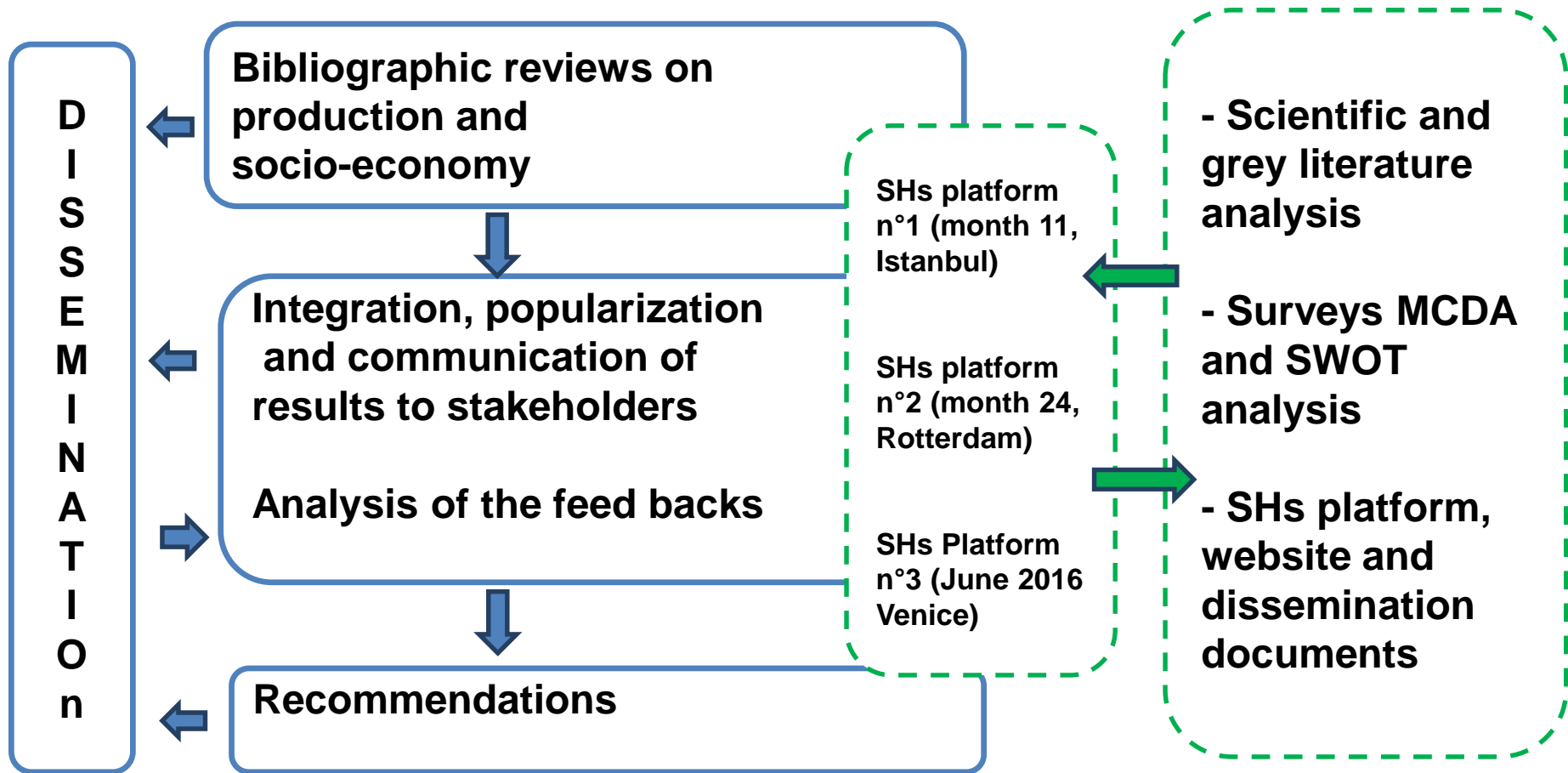


- Multi-stakeholder platform meetings:

- **Platform 1** – *Back to back with the meeting of the International Federation of Organic Agriculture Movements (Ifoam), Istanbul October 2014:*
presentation of first bibliographic analysis and exchanges on the project in general (conditions for success, possible bottlenecks...)
- **Platform 2** – *October 19 et 20, 2015 in Rotterdam (back to back with Aquaculture Europe 2015):*
presentation of finalized bibliographic studies, surveys for multi-criteria decision analysis (MCDA) on key questions
- **Platform 3** – *June 22-23, 2016:*
Presentation of the first draft of recommendations for discussion and amendments, taking into account the platform participant suggestions.



Project organization





Survey on consumer perception

500 participants in Germany, Italy, France and UK
About 20% consuming organic products

- 1 
- 2 
- 3 
- 4 
- 5 
- 6 
- 7 
- 8 
- 9 
- 10 
- 11 

*Used in France and the UK only.

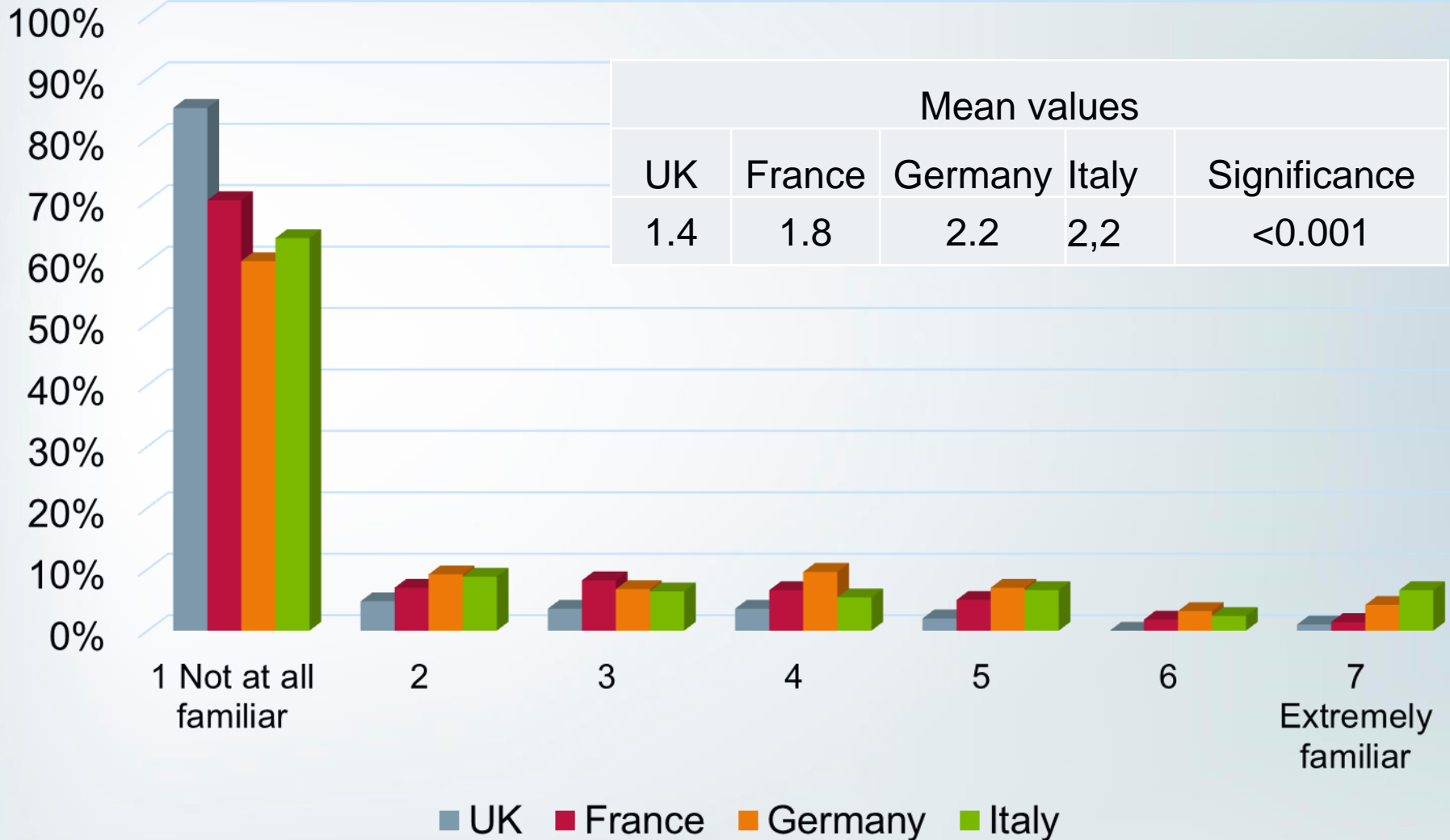
Labels are usually not well recognized:

The EU label  is not recognized by most of the European consumers.

Courtesy Pirjo Honkanen



Familiarity of the Euro-leaf logo



UK



24% Familiar
65% Unfamiliar
(49% Totally unfamiliar)



24% Familiar
67% Unfamiliar
(50% Totally unfamiliar)



10% Familiar
84% Unfamiliar
(69% Totally unfamiliar)



3% Familiar
93% Unfamiliar
(85% Totally unfamiliar)

France



53% Familiar
24% Unfamiliar
(8% Totally unfamiliar)



19% Familiar
63% Unfamiliar
(37% Totally unfamiliar)



8% Familiar
85% Unfamiliar
(70% totally unfamiliar)

Germany



48% Familiar
34% Unfamiliar
(11% Totally unfamiliar)

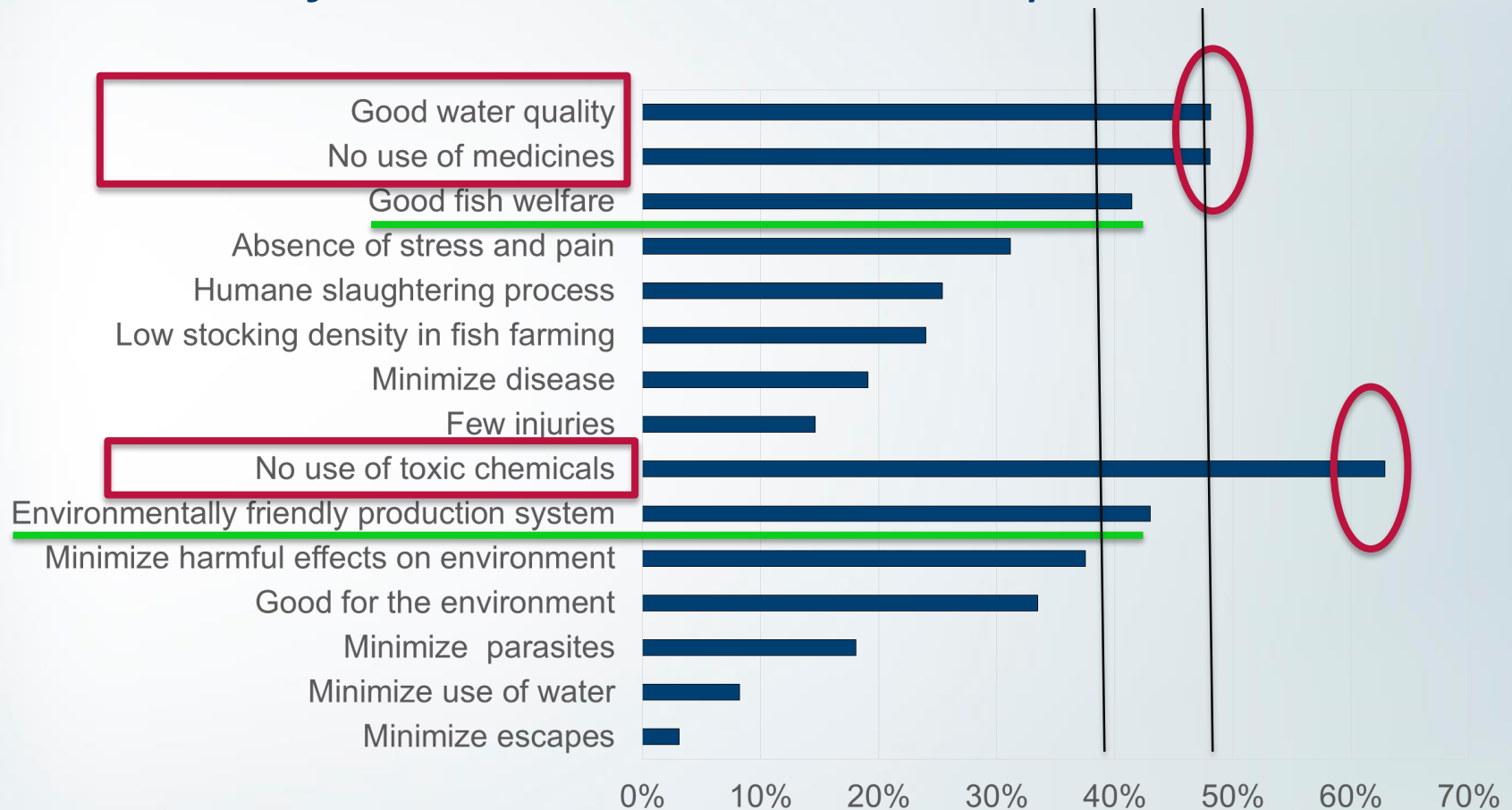


25% Familiar
61% Unfamiliar
(41% Totally unfamiliar)

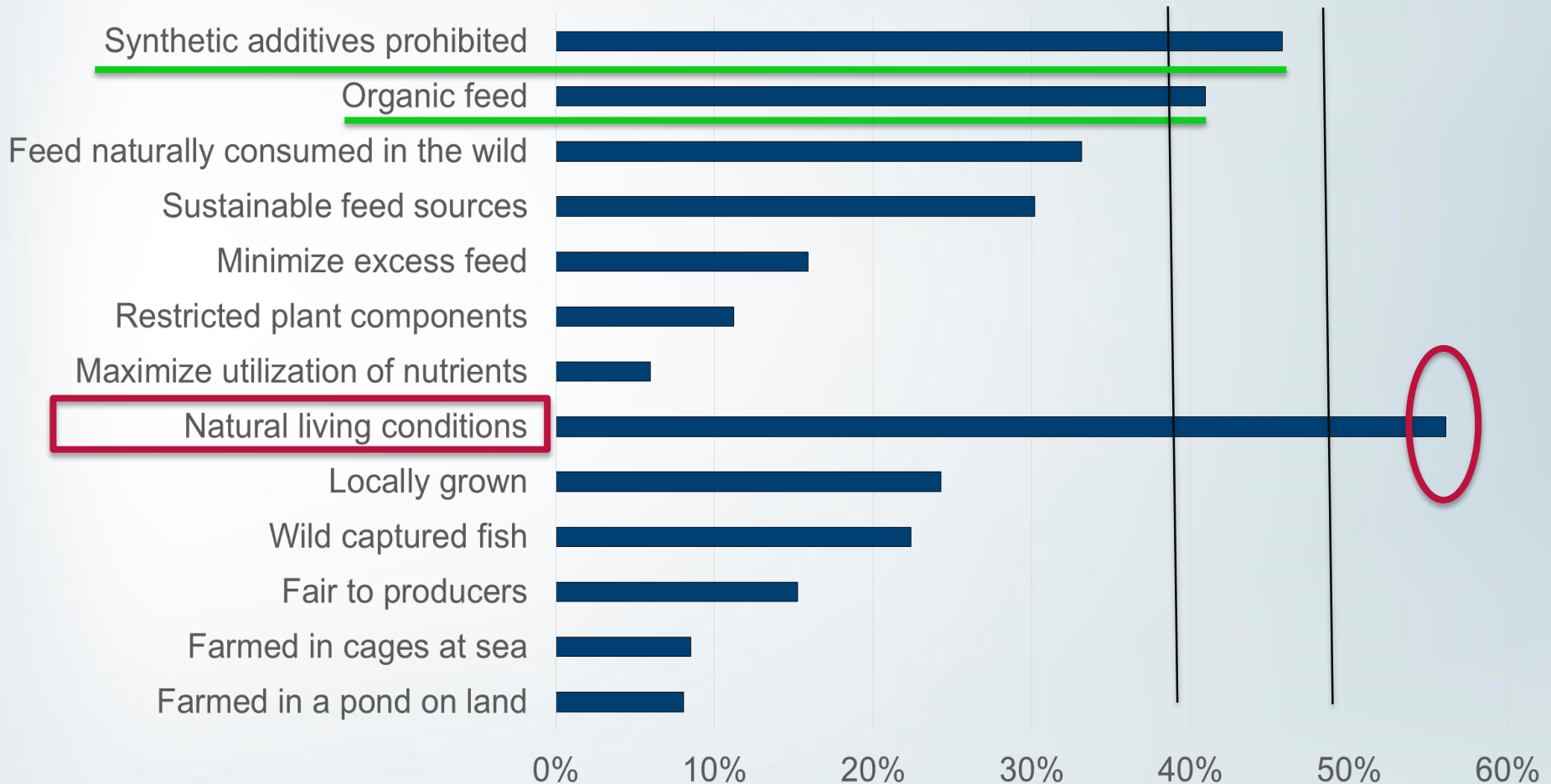


14% Familiar
76% Unfamiliar
(60% totally unfamiliar)

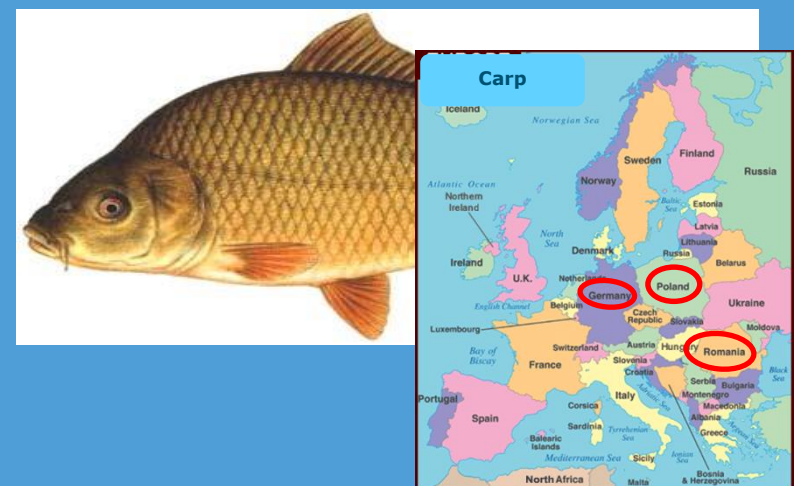
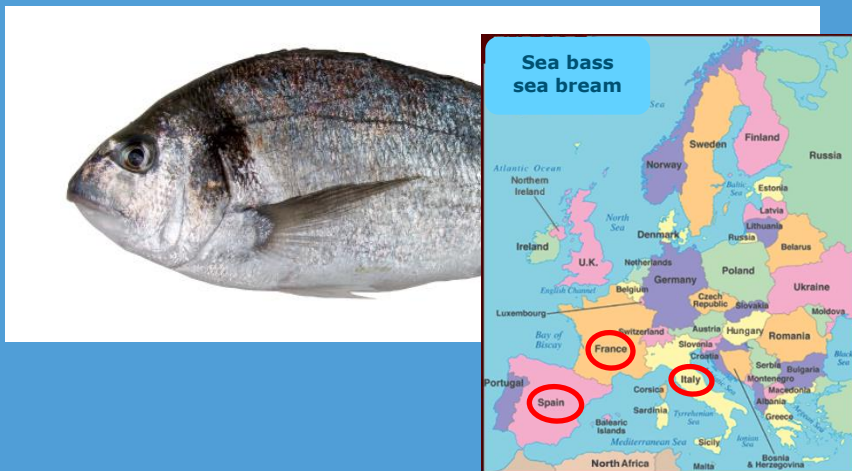
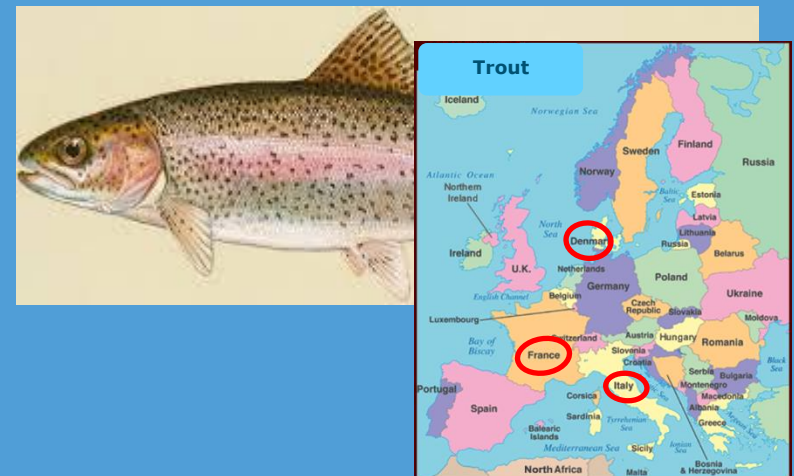
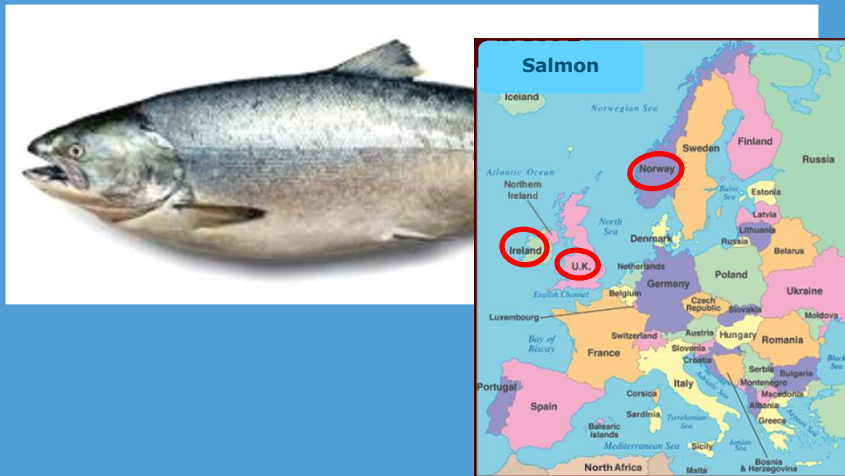
Defining features of organic fish - Fish welfare and environmental impact



Defining features of organic fish - Feed and production systems



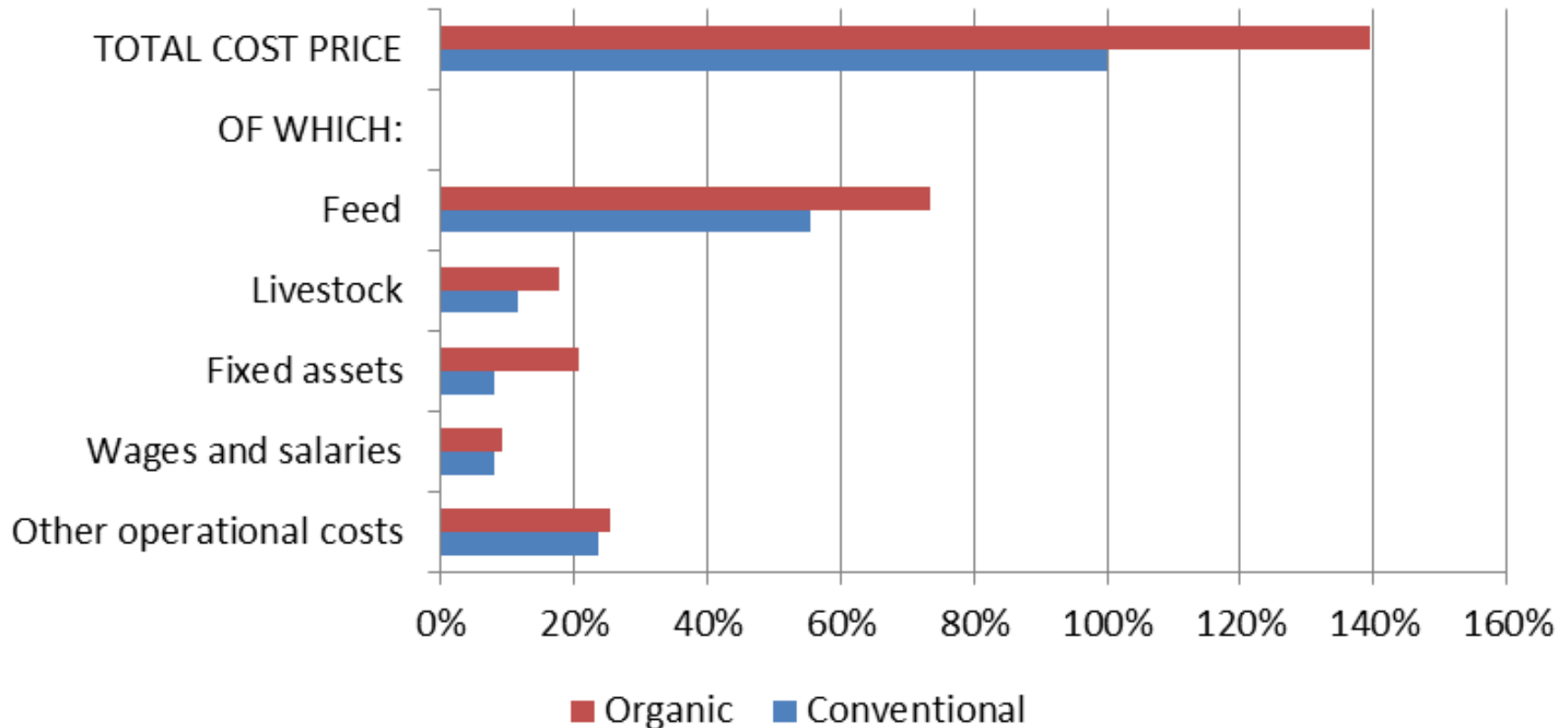
Economic aspects of organic aquaculture



Production cost effects for salmon

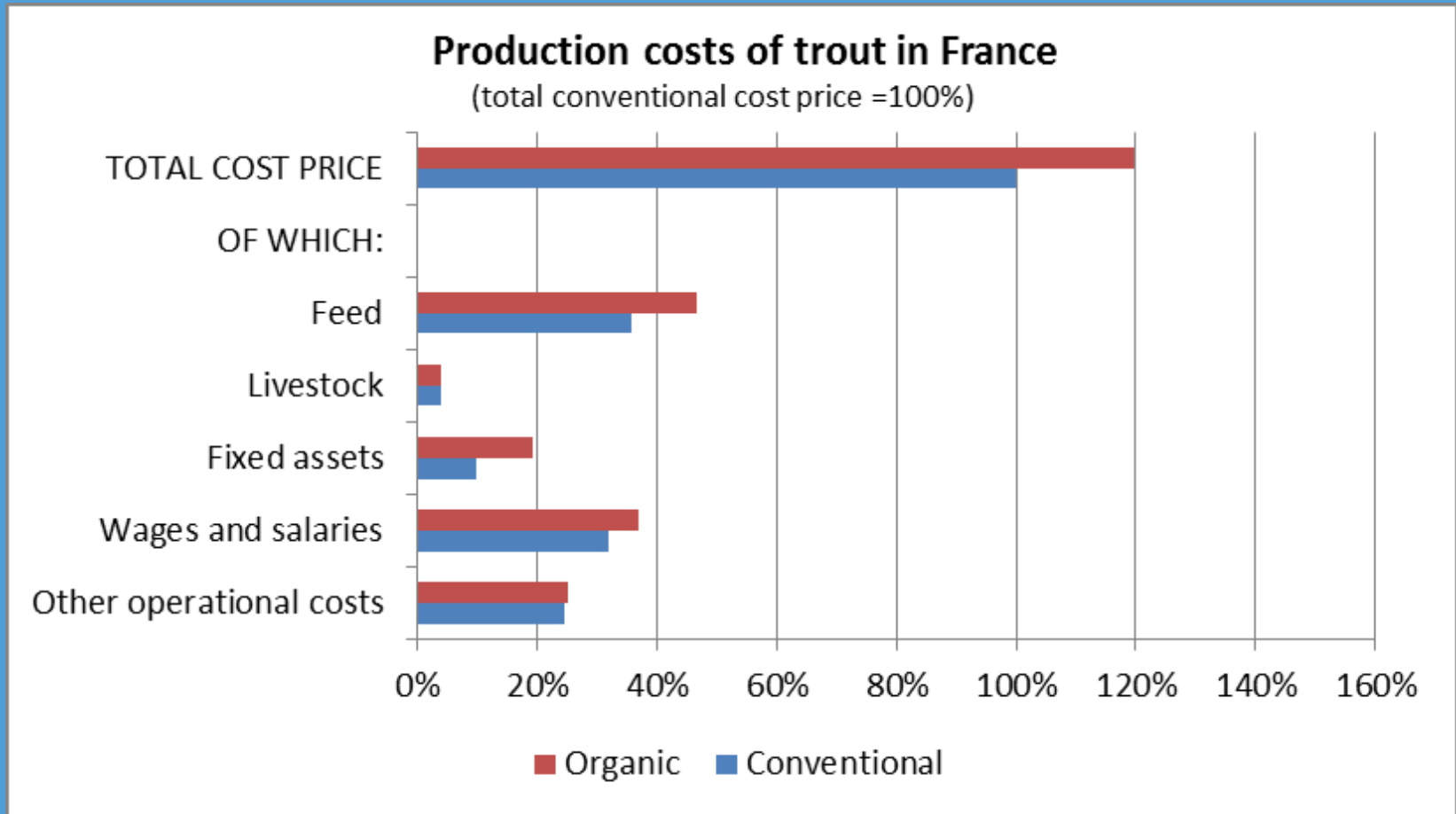
Production costs of salmon in Norway

(total conventional cost price =100%)



Courtesy Henri Prins

Production cost effects for trout



- Production costs +21% (DK), +20% (FR), +23% (IT)
- Due to feed (1), installation (2) and labour (3)

Breakdown salmon fillet

	Conventional		Organic	
Farmers price	€	3.90	€	5.00
Costs of gutting	€	0.60	€	0.60
Gutting loss		10%		10%
Price gutted fish	€	5.00	€	6.30
Percentage fillet		55%		55%
Price per kg fillet	€	9.10	€	11.50
Processing	€	4.90	€	6.20
Purchase price supermarket	€	14.00	€	17.70
Margin supermarket	€	6.20	€	12.80
Consumer price (excl. VAT)	€	20.20	€	30.50
VAT	€	1.30	€	1.50
Consumer price (incl. VAT)	€	21.50	€	32.00



Some controversial questions



Organic juveniles



Obligation of using organic juveniles since 2015:

But too few organic hatcheries to answer the demand

+

categories of health status and genetic traits

EGTOP propositions

- Utilization of organic juveniles when available***
- If not, at least 2/3 of the on-growing phase following the organic regulation***
- Creation of a database on organic juvenile producers***

***How to develop organic hatcheries if not an obligation /
how to develop the sector if not enough fingerlings?***



Recirculation systems



For economic reasons, recirculation systems

- are operated at high rearing densities,***
 - necessitate advanced water treatments (oxygenation),***
 - are disconnected from the natural aquatic environment,***
- which is not allowed by the organic principles as they are understood un EU.***

EGTOP proposition

Possibility to partially reuse the rearing water (about 70%) after natural treatments (algae, bivalves, natural filters), meaning kind of IMTA...

What about organic RAS fish in USA and Switzerland?



**Some of the recommendations discussed
during the last platform meeting**



“Socio-economy”

Communication strategy to **increase the consumer awareness and knowledge** about organic products (answers to the consumer demand, protection of the environment and respect of animal welfare) should be developed

Possibility of **derogation** to the production rules when exceptional circumstances, but **strictly limited** in order to maintain consumer confidence

More **homogeneous controls** (qualitative and quantitative checks) on organic farms, raw materials and organic products **among countries and certification bodies**



“Production systems” aspects

Rearing of **organic / non-organic** in the **same production unit** is allowed with **clear separation** criteria

Ban on **hormone** use and all **artificial / industrial systems** except aerators and exceptionally oxygen (critical periods and transport)

Non-organic juveniles allowed if no alternative provided that **2/3 of the production cycle** has to be organic (on growing)

Ecological water treatment (IMTA type) are allowed



“Health, welfare and biosecurity”



Recommended values for **stocking densities**, **oxygen / carbon dioxide** and **nutrients** concentrations have to be **specified by species** for rearing and for transport

Fish **condition indexes** (including injuries) shall be monitored

List and doses of **microorganisms and plants** which can be used in feed for **homeopathic treatments** should be defined

Biosecurity measures recognized at the **EU level** are needed



What after the end of the OrAqua project?



Facts and needs at the end of the OrAqua project



After a 3 years collective work, the stakeholders of the EU platform reached a **common understanding** of the organic aquaculture problematics

This common understanding at EU level has to be **shared at the international level** (basic principles / RAS example)

The current regulation has to be **continuously improved**, following the consumer expectations and the sector evolution

There is a **continuous need of interactions** / exchange of information between the 'organic sector' and the society



What future for the OrAqua platform?



Ongoing discussions with EATiP/TPOrganics (platform on all organic productions) and IFOAM (international federation organic agriculture movements) on how to **keep an active platform on organic aquaculture**

Priority actions:

- **Harmonize** the understanding of basic organic principles at the world level (EU, USA, Switzerland...)
- **Inform** and get **feed backs** from the sector (producers, consumers, retailers, governance, research...)
- Improve **regulation and controls** in accordance to society needs



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Thank you for your attention!

Site OrAqua: www.oraqua.eu

