

## **STECF EXPERT WORKING GROUP**

### **EWG 18-19**

#### **2018 Economic Report of the Aquaculture sector**

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DG MARE focal person: Angel Calvo (MARE A4)

Chair: Rasmus Nielsen

#### **Background and general objectives**

- Following the 2018 DCF call for economic data on the EU aquaculture sector, STECF EWG 18-19 is requested to analyse and comment on the economic performance of the EU and national aquaculture sectors between 2008 and 2016.
- The aquaculture report is one of the main source for providing socio-economic analysis on the performance of the EU aquaculture industry. It is also increasingly used by scientific bodies, national administrations and international institutions.
- In view of the above, the EWG is requested to provide an in-depth examination of the different factors of the economic performance of the EU aquaculture industry and to highlight the underlying trends and drivers of its economic performance.
- Given the social importance of this activity in many communities, particular emphasis should be paid to the social aspects of the analysis including trends in employment, salaries, labour productivity and female/male breakdown of the aquaculture employment. When possible, incorporating results from the pilot studies.
- The main socio-economic indicators, if possible and where relevant, should also be put into context with homologous figures at the EU and national levels, e.g., national average salaries, GDP, etc.
- The two main objectives for the 2018 exercise are to increase qualitative interpretation of all data outputs and to increase the usefulness of the report for DG MARE's policy development as well as for Member States and the industry.
- The final draft EWG report will be reviewed by the STECF during its winter plenary meeting in 2018.

#### **Specific objectives**

In preparing the 2018 report on the economic performance of the EU aquaculture sector, the STECF EWG 18-19 is requested to include the following:

- A summary of key findings.
- An overview of the economic performance of the EU aquaculture sector: including drivers and main trends. It must also include specific sections on employment (e.g. female/male employment and average salaries), economic performance contrasting

different segments, and productivity/employee at EU level as well as a brief summary for each national chapter.

- At EU level analyses of economic performance by aquaculture segments (marine, shellfish, freshwater) and species.
- National chapters on the economic performance of the aquaculture segments:
  - National aquaculture overview
  - Production and sales
  - Industry structure and employment
  - Economic performance and indicators
  - Structure and performance of aquaculture segments
  - Trends and triggers, including Recent developments and Outlook for future trends
  - Data coverage and quality
- Comparison of the variables reported under the DCF and the EU-MAP, looking in particular at differences and correspondences between both sources to minimise time-series disruptions. Discuss presentation and analysis in the EWG report of EU-MAP environmental (i.e., medicines and mortalities) and social data.
- As a matter of priority, the EWG is requested to ensure that all unresolved data transmission (DT) issues encountered prior to and during the EWG meeting are reported on line via the Data Transmission Monitoring Tool (DTMT) available at <https://datacollection.jrc.ec.europa.eu/web/dcf/dtmt>.

Guidance on precisely what should be inserted in the DTMT, log-on credentials and access rights will be provided separately by the STECF Secretariat focal point for the EWG.

**Special topic:** The current status of the Multiannual National Strategic Plans for the development of sustainable aquaculture and expectations for obtaining the underlying growth objectives

- Based on the Multiannual National Strategic Plans drawn up by Member States in accordance with Art. 34 of Reg. 1380/2013, the STECF is requested to assess the extent to which the measures/actions described therein have been, or are being implemented. The STECF is also requested to assess the potential growth in the EU aquaculture sector and based on such an analysis, indicate whether the objectives for growth in EU aquaculture are likely to be achieved by the end of the current funding period in 2023.