



# Recommendation on Covid-19 Impacts and Responses

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The Aquaculture Advisory Council (AAC) gratefully acknowledges EU funding support





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## **Introduction**

The Aquaculture Advisory Council (ASC) asked Dr. Lorraine Gray from Marine Atlas Consultants to review impacts of the COVID-19 pandemic on aquaculture farms and response mechanisms. A three-phased approach was taken to gather information:

1. Analysis of data to determine the impact on trade using data from Eurostat/EUMOFA.
2. Survey of farmers and Producer Organisations using an on-line questionnaire.
3. Interviews with representatives of France, Poland, Greece, Denmark and Spain on the use of EMFF funding or other forms of state aid that used to mitigate the negative impact on aquaculture farms.

A draft report was sent to the AAC in August 2021 and approved at a WG-3 meeting in October 2021<sup>1</sup>.

## **Conclusions**

The aquaculture food system was especially vulnerable to the COVID-19 pandemic. Those companies targeting intra-EU trade of high-value species and/or selling to the HoReCa sector (oyster, seabass and mussels) suffered the most. Trade to outside the EU was most favourable for mussels although export and import sales of carp and freshwater fish suffered the most. Except for Denmark and Romania, about one-third from the other countries surveyed were dependent on the HoReCa sector.

The impact to sales was of greatest importance to all stakeholders and the impact to production costs was of least concern. The processing sector faced the challenge of establishing safe working conditions among its workers. The processing sectors that produced durable products and targeted the retail segment have performed the best under the pandemic.

Except for carp, stakeholders said volume of sales decreased across all species, on average by 15%. A reduction in sales was greatest for oyster (31%). Stakeholders responded to say carp costs and sales volume had increased. Sales volume of freshwater trout decreased on average by 14% despite cost increases.

The most significant changes in intra-EU export from 2019 to 2020 were value decreases for mussels and oyster due to decreases in volumes exported. Intra-EU imports of oyster, mussels, seabass and fishmeal decreased. The most significant changes in extra-EU export from 2019 to 2020 were value decreases for carp, oyster and freshwater fish. Extra-EU import volumes decreased for carp, freshwater fish and seabass.

The impacts are far-reaching into the future, with more than 50% of respondents saying they had delayed investment due to the COVID pandemic.

The adaption and mitigation measures varied significantly between aquaculture companies and member states.

## **Recommendations**

The report proposes the following six recommendations which were all approved by the AAC:

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<sup>1</sup> [EU COVID Impacts and Response – A stakeholder review, Marine Atlas Consultants, 2021](#)

1. Any future data collection surveys should request Producer Organisations and associations to select representative farmers in various countries and perform structured interviews.
2. Substantive improvements to data collection in aquaculture must be supported by DG MARE.
3. The long-term effects of the COVID-19 pandemic still have to materialise fully, and in order to assess the full impact, effects should be analyzed post-pandemic as markets return to pre-pandemic levels.
4. DG MARE should provide funding to implement promotional campaigns to support local aquaculture products. Funding should also be provided to support technological solutions in sales and marketing local products.
5. A follow-up study (like the present one) should be carried out in 2022 and targeted towards certain POs and farmers.

DG MARE should develop a more flexible and agile financial support mechanism that reflects the diversity of the EU aquaculture sector. This would best be administered by the Commission to avoid differences observed between Member States.



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