



AAC Recommendation on indicators for the annual survey of Member States

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I. Background

The annual survey of Member States on performance indicators aims to monitor the progress and impact of the implementation of the European Commission's Strategic guidelines, the Member States' Multi-Annual National Strategic Plans, and the use of the European Maritime, Fisheries and Aquaculture Fund (EMFAF) for the implementation of these plans.

The AAC acknowledges the findings in the mid-term assessment report on the Strategic guidelines¹. It also notes the Council's position, emphasising the importance of making use of existing data when setting and monitoring indicators to avoid an excessive increase in the administrative burden of data collection², and the European Commission's proposal for a new regulation on European Fisheries and Aquaculture Statistics (EFAS)³.

On the latter, this recommendation considers that the Eurostat and the Scientific, Technical and Economic Committee for Fisheries (STECF) aquaculture economic reports present differing values for EU aquaculture production.

This document provides recommendations to the European Commission.

II. Justification

1) Baseline

The baseline for the indicators is the reference period 2016 to 2020. The AAC advises limiting the baseline to production figures (volume), as the value of the production is impacted by several factors not directly influenced by the Strategic guidelines.

The AAC highlights that the Eurostat and STECF aquaculture economic reports present different figures for EU aquaculture production, as shown below.

1,000 tonnes	2016	2017	2018	2019	2020	AVG
Eurostat	1,092	1,142	1,133	1,220	1,071	1,132
STECF	1,422	1,276	1,309	1,207	1,158	1,274

The Eurostat figures are based on Regulation 762/2008⁴, where production is defined as the 'output from first sales', whereas the STECF reports are based on Regulation 2021/1167⁵,

¹ Mid-term assessment of the implementation of the 'Strategic guidelines for EU aquaculture' and the 'Multi-annual National Strategic Plans' for aquaculture, European Commission, 2025

² Council conclusions on the EU's new aquaculture strategic guidelines, PECHE 270, 2022

³ Proposal for a regulation on European fisheries and aquaculture statistics, COM(2025) 435 final

⁴ Regulation on the submission by Member States of statistics on aquaculture, Regulation 762/2008

⁵ Establishing the multiannual Union programme for the collection and management of biological, environmental, technical, and socioeconomic data in the fisheries and aquaculture sectors from 2022, Commission Delegated Regulation, 2021/1167

using 'weight of sales'. The two regulations do not provide any details that explain the differences in production figures.

The AAC assumes that the proposed EFAS regulation will continue to use the STECF definition and that this will lead to a harmonisation and alignment of the Eurostat and STECF production figures.

The AAC agrees with the layout presented in Table 1 in the mid-term assessment report.

2) Indicators

To ensure effective monitoring, it is essential to establish a practical and focused approach to data collection. Considering the need to balance accuracy with feasibility, the most relevant metrics must be prioritised.

A streamlined solution is to limit the annual survey to five key performance indicators covering both conventional and organic farming. These indicators are outlined below.

It should be noted that the weight of sales is not included as a reliable Member State indicator, as the data need to be validated by the STECF before inclusion in the STECF bi-annual reports.

Licences enabling production

A new or renewed licence is the first step to increased production. The number reflects progress in reducing the long-standing obstacles to growth, namely, access to water/space and complex/long licensing procedures.

The AAC notes that the duration of licences varies considerably among Member States. In some cases, the duration of a licence (for example, 30 years) is split into subperiods (for example, 3 x 10 years). Renewals should not include extensions between subperiods.

The AAC invites the European Commission to discuss with the Member States the possible inclusion of the licenced area for marine and pond aquaculture (e.g., in km²) as an additional indicator linked to licences, as this indicates the production potential.

Investments and EMFAF productive investments

Investments to establish new or maintain existing production capacity constitute the second step to increased production. The use of EMFAF-funding reflects the extent to which Member States support growth.

Fish feed used

The third step for finfish farming concerns the amount of feed used. Once a licence has been granted and the company has invested in production capacity, the use of feed will increase, which will (eventually) be reflected in the weight of sales and, hence, in STECF reports (post-guidelines).

3) Further developments in the set of indicators

The AAC underlines that the five indicators constitute a minimum set of indicators balancing the Council's requirement to avoid an increased burden on Member States in terms of data collection and on stakeholders as regards monitoring (quantifiable) progress towards the Union's policy on aquaculture.

The AAC emphasises the long-term need to include additional indicators to monitor the CFP objective on the sustainable development of Union aquaculture and, further, that this requires additional indicators to cover economic, social, environmental, and welfare factors.

On this matter, the proposed indicators serve as an operational compromise between institutionalising the annual survey and introducing a complete set of sustainability indicators.

III. Recommendations

AAC recommendations:

To the European Commission

Baseline

1. The AAC recommends that the STECF be asked to validate the figures (baseline and post-guidelines) and update the table with the missing commodity data.

1,000 Tonnes	Baseline						Post-guidelines			% AVG
	2016	2017	2018	2019	2020	AVG	2021	2022	AVG	
Algae										
Crustacea										
Finfish										
Molluscs										
Other										
Total	1,422	1,276	1,309	1,207	1,158	1,274	1,172	1,182	1,177	-8%

2. The AAC recommends that additional tables be created to cover the development in the production of farmed organic aquaculture products (as foreseen in the EFAS

proposal) and in self-sufficiency rates for the above commodity groups, as included in the annual EUMOFA reports.

Indicators

3. The AAC recommends that the annual survey initially be limited to five key performance indicators covering conventional and organic farming. Two of the indicators are included in the EU multiannual plan for data collection and the EFAS proposal, and the remaining indicators are considered in the mid-term assessment:

	Algae	Crustacea	Finfish	Molluscs	Other
New licences granted (number)					
Licence renewals granted (number)					
Investments (€)					
EMFAF productive investments (€)					
Fish feed used (kg)					

Further developments in the set of indicators

4. The AAC recommends that the European Commission invite the Member States' technical experts on aquaculture, the STECF, and the AAC to discuss the development and introduction of a more refined set of indicators to be included in subsequent annual surveys.



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