POLICY BRIEF #11

January 2026

Strengthening organic aquaculture in Europe

Introduction

The aquaculture sector in Europe is still far from reaching its full potential in terms of growth and meeting the increasing demand for more sustainable seafood. The EU imports over 80% of the seafood that it consumes. Aquaculture products overall (including imports) represent 30% of EU consumption of seafood, while EU aquaculture products represent only 10% of EU consumption.[1]

Although, in principle, existing policy frameworks i.e. the Common Fisheries Policy (CFP), the European Maritime, Fisheries, and Aquaculture Fund (EMFAF), the Green Deal, the Farm to Fork Strategy, and the Multi-annual National Strategic Plans for Aquaculture provide support for organic aquaculture, available data on the actual support provided is rather scarce. This problem was also identified in the European Court of Auditors' report on organic farming support.

The European Commission has encouraged Member States to include the development of organic aquaculture among the objectives of their Multi-annual National Strategic Plans (NSPAs) for sustainable aquaculture 2021-2030. Nevertheless, the analysis of the status of organic aquaculture seems poorly developed in their plans. Countries seem to pay more attention to other forms of sustainable production, rather than organic aquaculture. This is evident from the limited emphasis placed on identifying objectives and activities that specifically promote the development of organic aquaculture, when contrasted with the efforts

Summary

This policy brief outlines key factors shaping organic aquaculture development in the EU.

Organic aquaculture is still at an early stage of development in many countries, and its situation is fragile. The enterprises are sensitive to input availability and costs (especially feed and juveniles), as well as market demand and prices, and production and processing systems can be capital intensive. Technical knowledge and market and policy engagement are critical. In most cases, it is not possible to integrate aquaculture systems within broader farming systems to capitalise on synergies and provide a buffer in challenging circumstances.

This is why, among the most urgent issues, it is necessary to:

- Review the most pressing challenges currently faced by organic producers, in particular the lack of organic juveniles and organic feed.
- Provide organic support payments to compensate for higher input costs (feed, juveniles, equipment investment) and necessary support for the transition to organic aquaculture.
- Streamline licensing and spatial planning frameworks, including accelerated procedures for certified organic aquaculture projects and designating specific zones for organic aquaculture within Maritime Spatial Planning (MSP) frameworks.

[1] EUMOFA (2022) The EU Fish Market. 2022 Edition. European Market Observatory for Fisheries and Aquaculture Products. https://www.eumofa.eu/documents/20178/521182/EFM2022_EN.pdf.

allocated to the analysis and promotion of conventional aquaculture.

A further element of concern derives from the Commission's choice, as part of the EU's long-term budget for 2028-2034, not to present a separate fund to support the Common Fisheries Policy (CFP). Instead, support for fisheries, aquaculture, and ocean-related activities would be integrated into a single, larger fund that also covers other areas, such as cohesion and agriculture. The loss of the dedicated EMFAF fund, through the integration of fisheries and aquaculture support into broader national programmes, coupled with the considerable autonomy granted to Member States in designing their national measures, risks weakening the uniformity and traceability of fisheries and aquaculture related spending, including support for organic aquaculture.

Key findings

A quantitative systematic literature review was conducted in the OrganicTargets4EU project, with the aim of identifying and analysing the factors that either constrain or support the development of European organic aquaculture, including technical, business, and policy issues.[2]The overall search strategy was based on the PRISMA protocol, including both peer-reviewed articles and grey literature. The review focuses on the species most farmed in European organic aquaculture: Atlantic salmon, rainbow trout, common carp, European sea bass, gilthead seabream and shellfish. The top six constraining factors identified were:

- Perceived feasibility of organic aquaculture from the farmers' perspective
- Price difference between organic and conventional products for consumers
- Availability and costs of organically produced inputs (e.g., juveniles, feed)
- Level of bureaucratic complexity and applicability of organic aquaculture rules
- Consumer awareness and knowledge about organic aquaculture and product added value
- Availability of incentives (support payments and investment aids)

After two rounds of Delphi interviews with a panel of experts (i.e., consultants, researchers, processors, and retailers), the following key areas of the food supply chain were highlighted to promote key strategies for the growth of the organic aquaculture market in Europe in the coming years:

- Technical/regulatory barriers
- Selling prices and production costs
- Boosting organic food in out of home catering

The Multi-annual National Strategic Plans examined do not contain any objectives for the development of **Knowledge and Innovation Systems (KIS)** for organic aquaculture or only mention general objectives, without any specific organisational aspects. Interviews and online surveys with aquaculture experts led to the following suggestions for the development of organic aquaculture KIS:

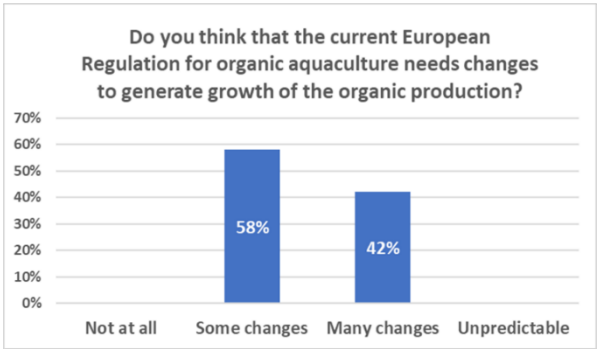
- Establish specific units on organic aquaculture in national and regional governmental bodies to support regulation and planning

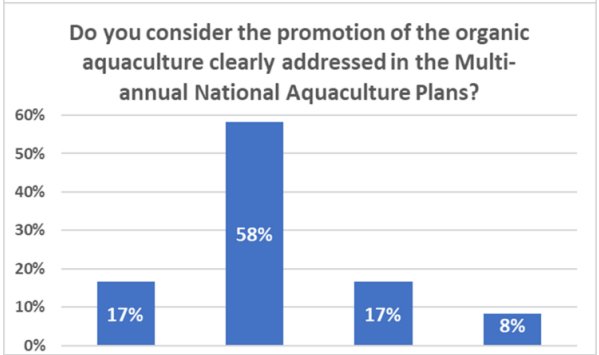
[2] Toomey L, Alfonso S, Carbonara P, Jahrl I, Mente E, Lampkin N, Lembo G (2025) Unlocking the potential of organic aquaculture in the EU: a review of policy support and supporting and constraining factors. *Reviews Aquaculture* 17(4): e70089, https://doi.org/10.1111/raq.70089.

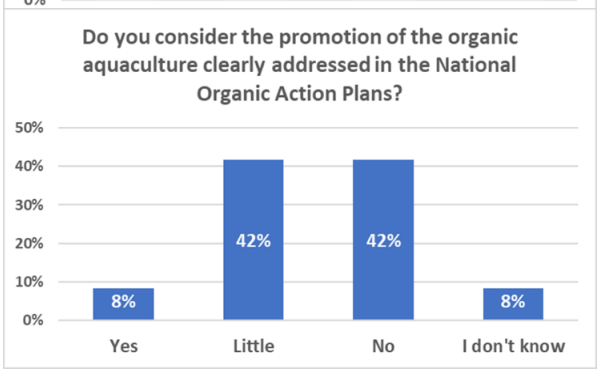
- Provide allocated funds addressing KIS development for organic aquaculture
- Foster the development of a practice-oriented research system, together with a multi-stakeholder engagement process to facilitate effective knowledge transfer
- Establish mechanisms to feed research results to advisory system, training, and education

The main results of the project were discussed with stakeholders from several EU countries at an aquaculture workshop held on-line in May 2025 to validate findings through feedback on the main topics addressed by the project, specifically on:

- production systems: barriers, constraints and future trends;
- policy support for organic aquaculture production;
- supply chain development;
- consumer demand;
- knowledge and innovation systems;
- research and Innovation.







Participants considered the most relevant constraining factor to the development of organic aquaculture the availability and cost of organically produced inputs, followed by the price gap between organic and conventional products.

Developing innovations to improve the impact of aquaculture on nature and environment, as well as developing alternative feeds using proteins of non-animal origin, were identified as important factors. The three key recommendations were:

- Facilitate the provision of organic eggs and juveniles,
- Develop effective marketing strategies to stimulate growth in the sector
- Promote financial incentives.

Policy recommendations

To build organic aquaculture up to the same status and importance for EU sustainability outcomes as organic farming, we recommend that:

At EU level, as part of the current review of organic regulations, develop smarter, more flexible organic aquaculture regulations, by:

- Reviewing the most pressing regulatory challenges currently faced by organic producers, in particular the lack of organic juveniles and of organic feed. Amendments to the regulations should be discussed in the context of the current availability of certified hatcheries and alternative proteins or ingredients for the formulation of organic feeds. The interpretation of

EU organic rules should be aligned across all Member States and control bodies to minimise uncertainty for producers.

At national level, incentivise organic producers, as land-based producers, by:

- Providing organic support payments to compensate for higher input costs (feed, juveniles, equipment investment) and the transition to organic aquaculture. Equivalent measures to those for organic farming in the proposed CAP Regulation 2028-2034 should be included in the Common Fisheries Policy proposals. Member States should integrate funded, measurable organic aquaculture targets into both national aquaculture plans and organic action plans.
- Establishing specific units on organic aquaculture within national and regional governmental bodies to support regulation and planning, including streamlining licensing and spatial planning frameworks, including accelerated procedures for certified organic aquaculture projects and designating specific zones for organic aquaculture within Maritime Spatial Planning frameworks.

At national level, support organic aquaculture supply chain development and consumer demand, by:

- Collaborating with **supermarket chains and other retailers** to establish dedicated organic aquaculture product lines, incorporating storytelling and branding, to further raise consumer awareness.
- Using **public procurement** to include organic seafood products in school canteens, hospitals, and public catering outlets, creating stable demand and raising consumer awareness.

At EU and national level, invest in research and innovation and associated advisory and dissemination facilities, by:

- Allocating a proportion of the EMFAF or the forthcoming EU Research and Innovation Framework Programme (as well as national funds) to **dedicated research and innovation in organic aquaculture** and supporting the development of **organic aquaculture knowledge and innovation systems**, including advice, mentoring, training, research, statistics and market data, and the development of institutional capacities and peer-to-peer networks or operational groups linked to public-sector institutions and organic sector organisations.

Further information

Lampkin N, Lembo G, Rehburg P (2024). *Assessment of agricultural and aquaculture policy responses to the organic F2F target*. Deliverable D1.2. OrganicTargets4EU. IFOAM Organics Europe. https://orgprints.org/id/eprint/52716/.

Lampkin N, Padel S (2026) *Policy Recommendations for the Delivery of the Organic F2F Targets by 2030 and Beyond*. Deliverable D7.1. OrganicTargets4EU. IFOAM Organics Europe. https://orgprints.org/id/eprint/10862.

Giuseppe Lembo and Lola Toomey, Fondazione COISPA ETS, Italy, January 2026

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