

AQUACULTURE PRODUCERS IN THE ATLANTIC AREA REGION

PROJECT IDENTIFICATION:
EAPA_1059/2018 – ACCESS2SEA

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SECTION ONE: OVERVIEW

Introduction

During the period August to September 2019, the Partner Organisations of the Access2Sea Project prepared an inventory of aquaculture producers for each of their regions. All data collected is regional data, and each partner has determined the geographical boundaries of its region. This inventory was analysed by a range of criteria including size of company, legal structure, main business activity and primary species. A summary of the analysis by Partner Region is outlined below and is followed by a comparison of the data by Partner Region. More detailed analysis by Partner Region is available in the following sections of this document.

Welsh Region

A total of 38 aquaculture producers were identified by the Welsh Partner of the Access2Sea Project. The largest group of companies (37%) were micro companies i.e. companies with <10 employees. More than half of the companies were identified as Limited Companies. Production was identified as the main business activity for more than half the companies in the group (53%). The primary species was quite varied across the group, with the highest number of companies identifying Bottom Mussel as their primary species (7 No. companies or less than 20% of the group).

Andalucía Region

A total of 69 aquaculture producers were identified by the Andalucían Partners of the Access2Sea Project. The largest group of companies (60%) were micro companies i.e. companies with <10 employees. Just less than half of the companies identified were established as Limited Companies (45%). Production was identified as the main business activity for 18 companies in the group (26%) and Wholesale & Retail Trade was identified as the main business activity for eleven companies (16%). More than half the companies in the group (54%) identified

Varied as their Primary Species with 38% of companies identifying Gilt-Head Bream and 26% identifying European Seabass as one of their primary species.

Irish Region

A total of 287 aquaculture producers were identified by the Irish Partners of the Access2Sea Project. Company size was not identified for the companies in this group. More than half of the companies in the group (63%) were identified as Limited Companies. Production was identified as the main business activity for 221 companies in the group (77%). Trestled Oyster was identified as the primary species for largest cohort of companies in the group, 170 in total (59%).

Portuguese Region

A total of 41 aquaculture producers were identified by the Portuguese Partners of the Access2Sea Project. Six companies (15%) were identified as micro companies i.e. companies with <10 employees and two as SMEs (5%). Size was not identified for the remaining companies in the group. More than half of the companies identified were established as Limited Companies (59%). Production was identified as the main business activity for 26 companies in the group (63%). Native Oyster was identified as the primary species for eight companies in the group (20%). This was the largest number of companies in the group to identify the same species as their primary species in the data supplied.

Brittany Region

A total of 186 aquaculture producers in Brittany were identified by the French Partners of the Access2Sea Project. The largest group of companies, 177 in number (95%) were micro companies i.e. companies with <10 employees. The largest cohort of companies in the group, 141 in total (76%), were identified as Limited Companies. Production and Commercialisation was identified as the main business activity for 106 companies in the group (57%). Gigas Oyster was identified as the primary species for 120 companies in the group (65%).

Comparison by Partner Regions

The following four Tables give a comparison of the data collected by Partner Regions across the criteria of Company Size, Business Model, Main Business Activity and Primary Species.

Table 1: No. of Companies by Company Size

<i>Partner Region</i>	<i>Micro</i>	<i>SME</i>	<i>Large</i>	<i>Size Unidentified</i>	<i>Total</i>
Welsh Region	14	9	3	12	38
Andalucía Region	42	11	0	16	69
Irish Region	0	0	0	287	287
Portuguese Region	6	2	0	33	41
Brittany Region	177	8	1	0	186

Table 2: No. of Companies by Business Model

<i>Partner Region</i>	<i>Sole Trader</i>	<i>Limited Company</i>	<i>Partnership</i>	<i>Co-operative</i>	<i>Other</i>	<i>Business Model Unidentified</i>	<i>Total</i>
Welsh Region	0	22	1	0	2	13	38
Andalucía Region	21	31	2	0	0	15	69
Irish Region	92	181	6	6	2	0	287
Portuguese Region	5	24	5	1	0	6	41
Brittany Region	37	141	4	3	0	1	186

Table 3: No. of Companies by Main Business Activity

<i>Partner Region</i>	<i>Production</i>	<i>Production & Processing</i>	<i>Production & Commercialisation</i>	<i>Production Processing & Commercialisation</i>	<i>Other</i>	<i>Main Business Activity Unidentified</i>	<i>Total (No. of Co's)</i>
Welsh Region	8	4	7	1	7	11	38
Andalucía Region	3	0	11	4	11	40	69
Irish Region	221	0	66	0	0	0	287
Portuguese Region	8	0	12	6	2	13	41
Brittany Region	55	4	106	15	4	2	186

Table 4: No. of Companies by Primary Species

<i>Partner Region</i>	<i>No. 1 Primary Species (No. of Co's)</i>	<i>No. 2 Primary Species (No. of Co's)</i>	<i>No. 3 Primary Species (No. of Co's)</i>	<i>Other / Varied (No. of Co's)</i>	<i>No Main Species Identified (No. of Co's)</i>	<i>Total (No. of Co's)</i>
Welsh Region	Bottom Mussel (7 Co's)	Freshwater Trout (4 Co's)	Hatchery Lumpfish (3 Co's) Aquarium Fish (3 Co's)	Other / Varied Species (12 Co's)	No main species identified (9 Co's)	38
Andalucía Region	Mussels (6 Co's)	Gilt Edge Bream (5 Co's)	Microalgae (2 Co's) Japanese Carpet Shell (2 Co's)	Other / Varied Species (44 Co's)	No main species identified (10 Co's)	69
Irish Region	Trestled Oyster (170 Co's)	Rope Mussel (58 Co's)	Bottom Mussel (26 Co's)	Other / Varied Species (32 Co's)	No main species identified (1 Co)	287
Portuguese Region	Native Oyster (8 Co's)	Gigas Oyster (1 Co)	Rope Mussel (1 Co)	Other / Varied Species (1 Co)	No main species identified (30 Co's)	41
Brittany Region	Gigas Oyster (120 Co's)	Rope Mussel (16 Co's) Native Oyster (16 Co's)	Freshwater Trout (9 Co's)	Other / Varied Species (18 Co's)	No main species identified (7 Co's)	186

SECTION TWO: WELSH REGION

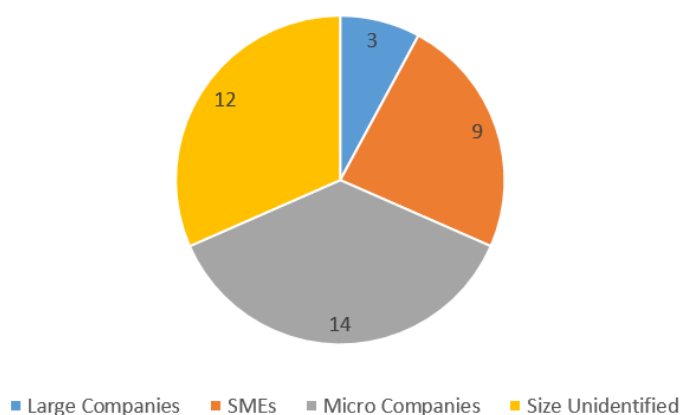
Overview

A total of 38 aquaculture producers were identified by the Welsh Partner of the Access2Sea Project. The largest group of companies (37%) were micro companies i.e. companies with <10 employees. More than half of the companies were identified as Limited Companies. Production was identified as the main business activity for more than half the companies in the group (53%). The primary species was quite varied across the group, with the highest number of companies identifying Bottom Mussel as their primary species (7 No. companies or less than 20% of the group).

Company Size

Of the 38 aquaculture producers identified, the largest cohort of companies in the group, 14 in total, were identified as micro companies i.e. companies with <10 employees. Nine companies were identified as SMEs i.e. companies with between 10 and 250 employees. Three companies in the group were identified as large companies i.e. companies with in excess of 250 employees. Size was not identified in the remaining twelve companies in the group.

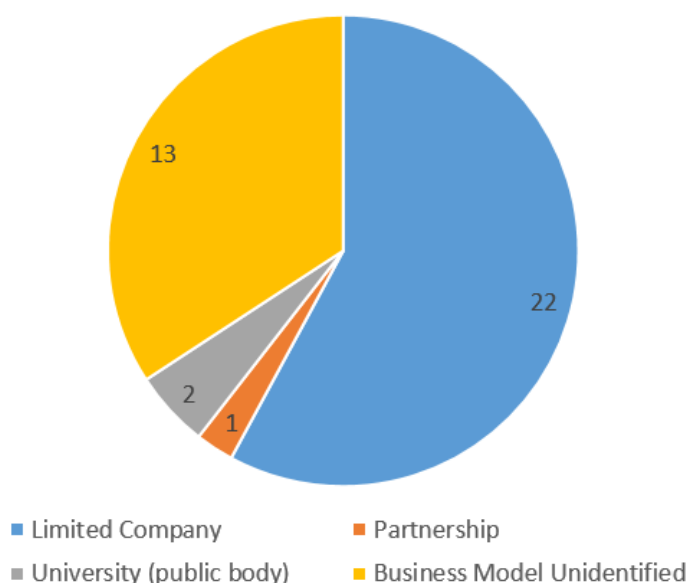
Company Size - Wales



Business Models

The largest cohort of companies in the group, 22 in total, were identified as Limited Companies. Two companies were identified as being part of a University or Public Body, and one company was identified as a Partnership. A Business Model was not identified for the remaining thirteen companies in the group.

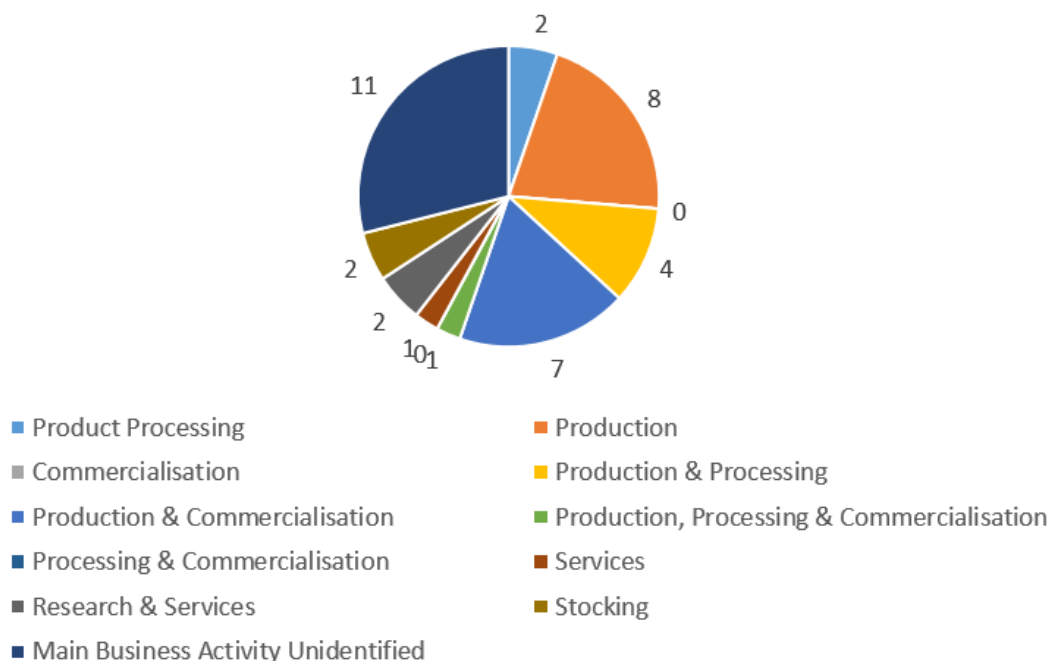
Business Models - Wales



Main Business Activity

Production was identified as the main business activity for 20 companies in the group. This was broken down into three further categories as follows: Production (8 No.), Production and Commercialisation (7 No.) and Production & Processing (4 No.) and Production, Processing & Commercialisation (1 No.) Two companies identified Product Processing, two companies identified Stocking, one company identified Services, and a further two companies identified Research & Services as their main business activities. No main business activity was identified for the remaining eleven companies in the group.

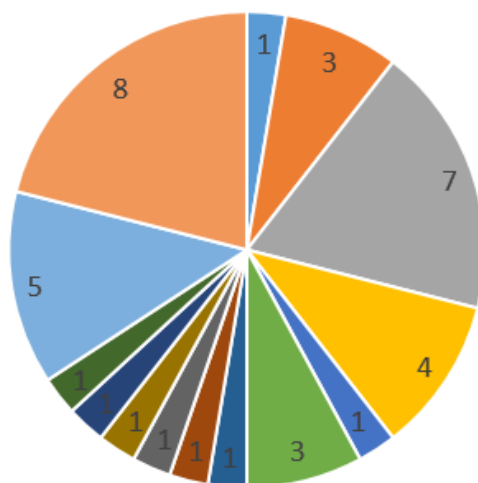
Main Business Activity- Wales



Primary Species

Bottom Mussel was identified as the primary species for seven companies in the group. This was the largest number of companies in the group to identify the same species as their primary species. Freshwater Trout was identified as the primary species for four companies, Hatchery Lumpfish for three companies, and Aquarium Fish for a further three companies. Each of the following species were identified as the primary species for one company: Genetically Male Tilapia, Koi Carp, Native Oyster, Oyster, Seaweed, Seaweed & Cockles & Wrasse. A further one company was identified as Other i.e. was not involved in either the production or processing of fish. Five companies identified their primary species as varied. No main species was identified for the remaining eight companies.

Primary Species - Wales



- Other
- Bottom Mussel
- Genetically Male Tilapia
- Koi Carp
- Oyster
- Seaweed & Cockles
- Varied Species
- Aquarium Fish
- Freshwater Trout
- Hatchery Lumpfish
- Native Oyster
- Seaweed
- Wrasse
- Main Species Unidentified

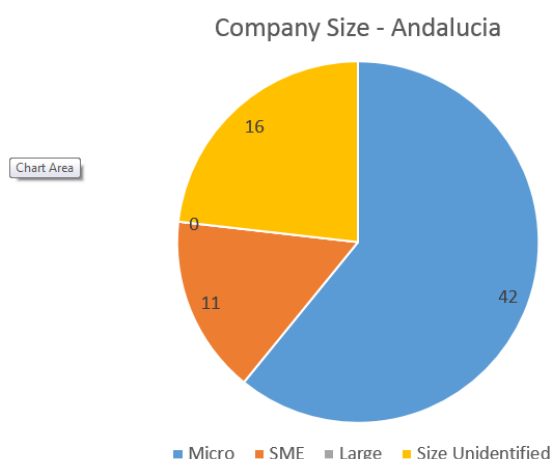
SECTION THREE: ANDALUCÍA REGION

Overview

A total of 69 aquaculture producers were identified by the Andalusian Partners of the Access2Sea Project. The largest group of companies (60%) were micro companies i.e. companies with <10 employees. Just less than half of the companies identified were established as Limited Companies (45%). Production was identified as the main business activity for 18 companies in the group (26%) and Wholesale & Retail Trade was identified as the main business activity for eleven companies (16%). More than half the companies in the group (54%) identified Varied as their Primary Species with 38% of companies identifying Gilt-Head Bream and 26% identifying European Seabass as one of their primary species.

Company Size

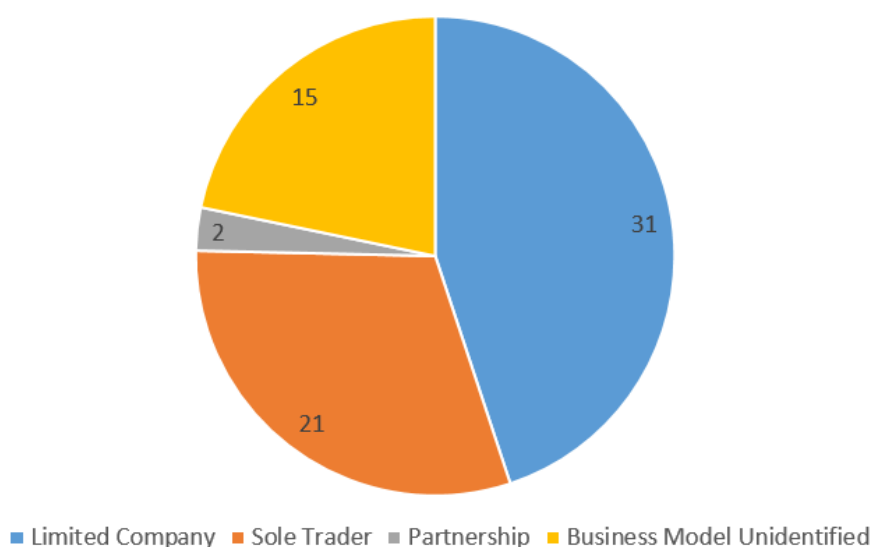
Of the 69 aquaculture producers identified, the largest cohort of companies in the group, 42 in total, were identified as micro companies i.e. companies with <10 employees (60%). Eleven companies were identified as SMEs i.e. companies with between 10 and 250 employees. None of the companies in the group were identified as large companies i.e. companies with in excess of 250 employees. Size was not identified in the remaining 16 companies in the group.



Business Models

The largest cohort of companies in the group, 31 in total, were identified as Limited Companies (45%). A further 21 identified as Sole Traders. Two companies were identified as Partnerships. A Business Model was not identified for the remaining fifteen companies in the group.

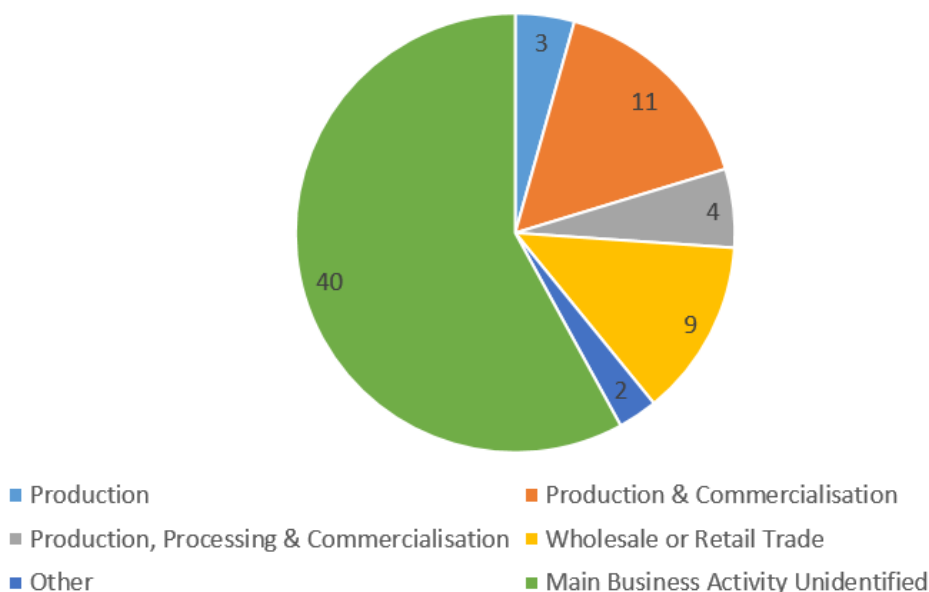
Business Models - Andalusia



Main Business Activity

Production was identified as the main business activity for 18 companies in the group. This was broken down into a three further categories as follows: Production (3 No.), Production and Commercialisation (11 No.) and Production, Processing & Commercialisation (4 No.) Nine companies identified as being involved in the Wholesale or Retail trades and a further two companies were identified as being involved in other activity relating to the Aquaculture Sector. No main business activity was identified for the remaining 40 companies in the group.

Main Business Activity - Andalucia

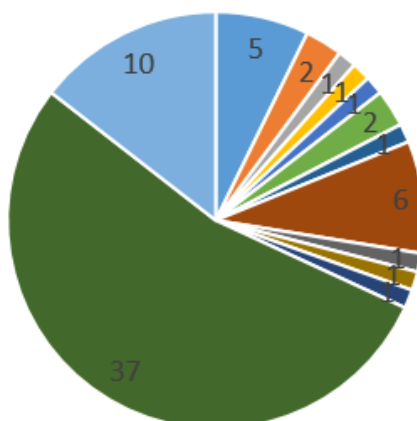


Primary Species

Mussels was identified as the primary species for six companies in the group. This was the largest number of companies in the group to identify the same species as their primary species. Gilt-Head Bream was identified as the primary species for five companies in the group. Microalgae was identified as the primary species for two companies, and Japanese Carpet Shell for a further two companies. Each of the following species were identified as the primary species for one company: Atlantic Bluefin Tuna, Greater Amberjack, Grooved Carpet Shell, Kuruma Shrimp, Pacific Oyster, Senegalese Sole and Common Sole.

A total of 37 companies identified their primary species as varied. The most common species seen in the varied group of companies included: Gilt-Head Bream (21 companies), European Seabass (18 companies), Grooved Carpet Shell (16 companies), Japanese Carpet Shell (15 companies), Common Sole (15 Companies), Flathead Grey Mullet (13 companies), European Eel (11 companies), Pacific Oyster (9 companies), Sargo (9 companies) and Common Ditch Shrimp (4 companies). No main species was identified for the remaining ten companies.

Primary Species - Andalusia



- Gilt-Head Bream
- Greater Amberjack
- Kuruma Shrimp
- Senagalese Sole
- Main Species Unidentified
- Microalgae
- Grooved Carpet Shell
- Mussels
- Sole
- Atlantic Bluefin Tuna
- Japanese Carpseshell
- Pacific Oyster
- Varied

SECTION FOUR: IRISH REGION

Overview

A total of 287 aquaculture producers were identified by the Irish Partners of the Access2Sea Project. Company size was not identified for the companies in this group. More than half of the companies in the group (63%) were identified as Limited Companies. Production was identified as the main business activity for 221 companies in the group (77%). Trestled Oyster was identified as the primary species for largest cohort of companies in the group, 170 in total (59%).

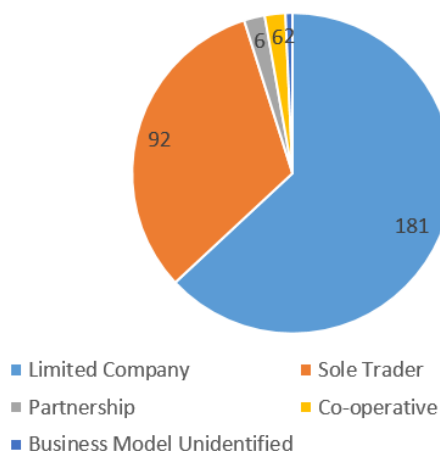
Company Size

Size was not identified for the companies in this group.

Business Models

The largest cohort of companies in the group, 181 in total (63%), were identified as Limited Companies. The next largest group of companies, 92 in total (32%) were identified as Sole Traders. Six companies was identified as Partnerships and a further six were identified as Co-operatives. A Business Model was not identified for the remaining two companies in the group.

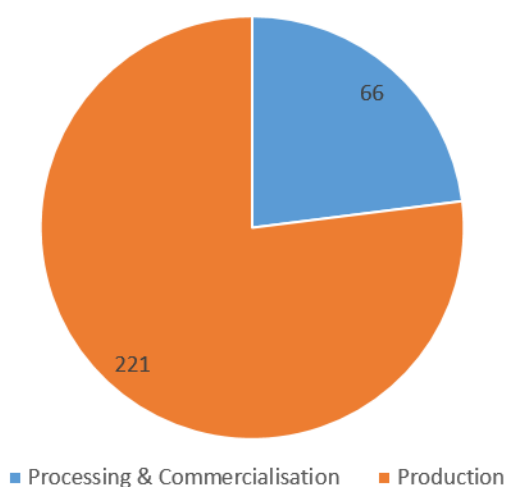
Business Models - Ireland



Main Business Activity

Production was identified as the main business activity for 221 companies in the group (77%). Processing & Commercialisation was identified as the main business activity for the remaining 66 companies in this group (23%).

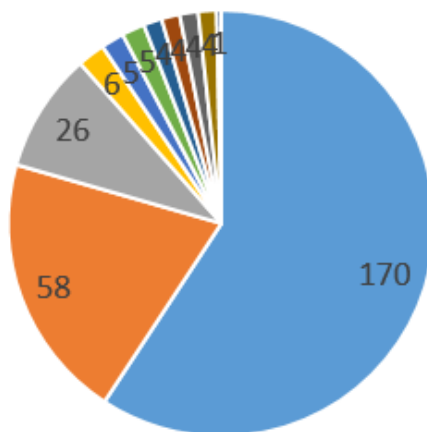
Main Business Activity - Ireland



Primary Species

Trestled Oyster was identified as the primary species for largest cohort of companies in the group, 170 in total (59%). Rope Mussel was identified as the primary species for the next largest group of companies, 58 in total (20%). Bottom Mussel was identified as the primary species for a further 26 companies (9%). Bottom Oyster was identified as the primary species for six companies, Caged Salmon for five companies, Seaweed for five companies, Shellfish Hatchery for four companies, Salmon Hatchery for four companies, Trout for four companies and Bottom Scallop for four companies. No main species was identified for the remaining one company.

Primary Species - Ireland



- Trestled Oyster
- Rope Mussel
- Bottom Mussel
- Bottom Oyster
- Caged Salmon
- Seeweed
- Shellfish Hatchery
- Trout
- Bottom Scallop
- Salmon Hatchery
- Primary Species Unidentified

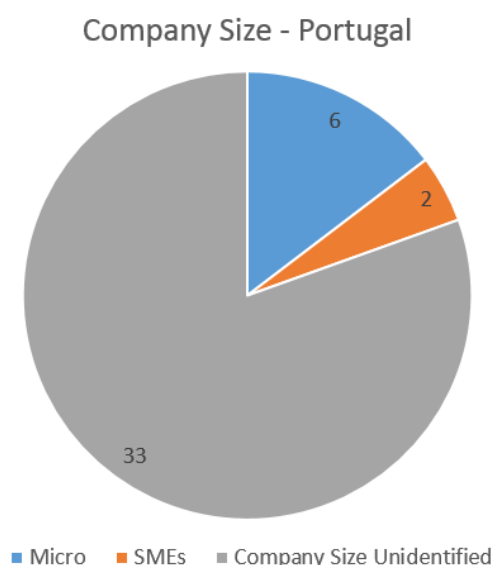
SECTION FIVE: PORTUGUESE REGION

Overview

A total of 41 aquaculture producers were identified by the Portuguese Partners of the Access2Sea Project. Six companies (15%) were identified as micro companies i.e. companies with <10 employees and two as SMEs (5%). Size was not identified for the remaining companies in the group. More than half of the companies identified were established as Limited Companies (59%). Production was identified as the main business activity for 26 companies in the group (63%). Native Oyster was identified as the primary species for eight companies in the group (20%). This was the largest number of companies in the group to identify the same species as their primary species in the data supplied.

Company Size

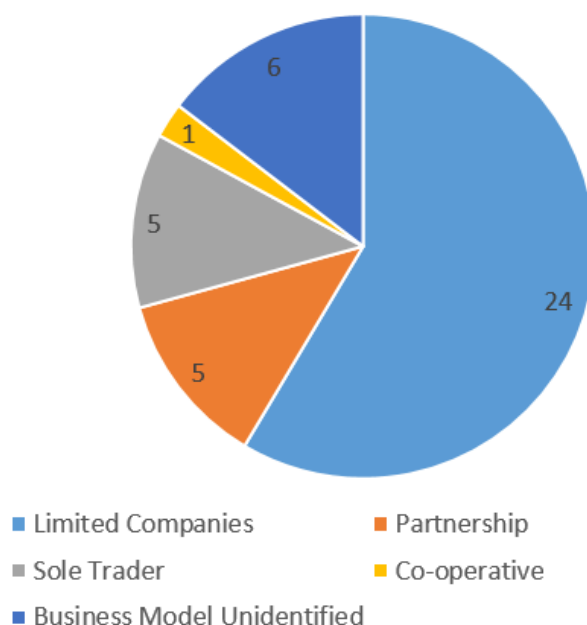
Of the 41 aquaculture producers identified, six in total were identified as micro companies i.e. companies with <10 employees (15%). Two companies were identified as SMEs i.e. companies with between 10 and 250 employees (5%). Size was not identified in the remaining 33 companies in the group.



Business Models

The largest cohort of companies in the group, 24 in total, were identified as Limited Companies (59%). Five companies were identified as Partnerships. Five companies were identified as Sole Traders, and a further one company was identified as a Co-operative. A Business Model was not identified for the remaining six companies in the group.

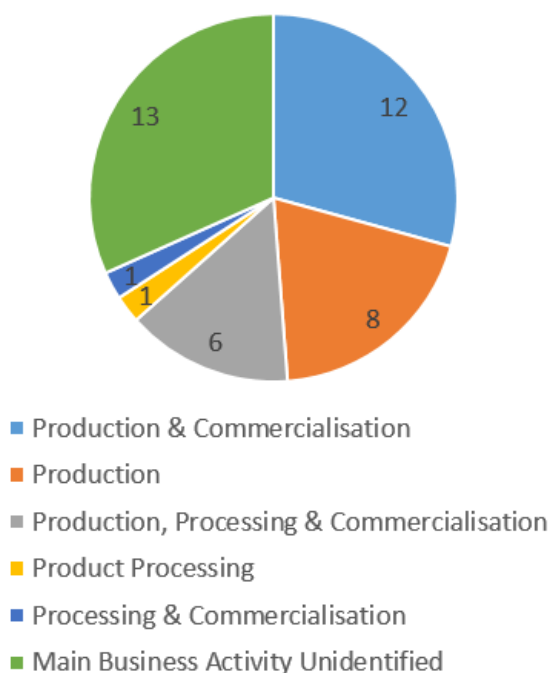
Business Models - Portugal



Main Business Activity

Production was identified as the main business activity for 26 companies in the group (63%). This was broken down into three further categories as follows: Production (8 No.), Production and Commercialisation (12 No.) and Production, Processing & Commercialisation (6 No.) One company identified Product Processing and one further company Processing & Commercialisation as their main business activities. No main business activity was identified for the remaining thirteen companies.

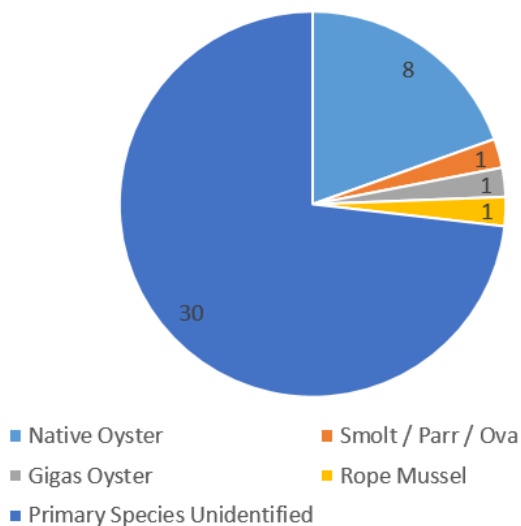
Main Business Activity - Portugal



Primary Species

Native Oyster was identified as the primary species for eight companies in the group (20%). This was the largest number of companies in the group to identify the same species as their primary species. Gigas Oyster was identified as the primary species for one company. Rope Mussel was also identified as the primary species for one company, as was Smolt / Parr / Ova. No main species was identified for the remaining 30 companies.

Primary Species - Portugal



SECTION SIX: BRITTANY REGION

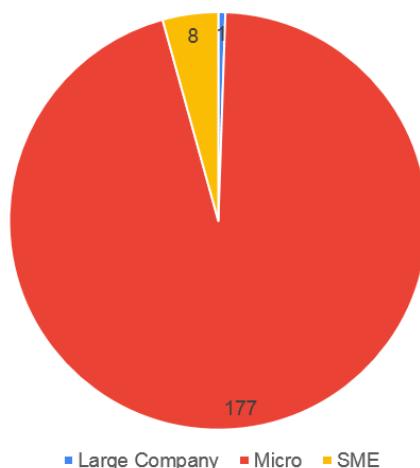
Overview

A total of 186 aquaculture producers in Brittany were identified by the French Partners of the Access2Sea Project. The largest group of companies, 177 in number (95%) were micro companies i.e. companies with <10 employees. The largest cohort of companies in the group, 141 in total (76%), were identified as Limited Companies. Production and Commercialisation was identified as the main business activity for 106 companies in the group (57%). Gigas Oyster was identified as the primary species for 120 companies in the group (65%).

Company Size

Of the 186 aquaculture producers identified in the Brittany region, the largest cohort of companies in the group, 177 in total (95%), were identified as micro companies i.e. companies with <10 employees. Eight companies were identified as SMEs i.e. companies with between 10 and 250 employees. One company in the group was identified as a large company i.e. a company with in excess of 250 employees.

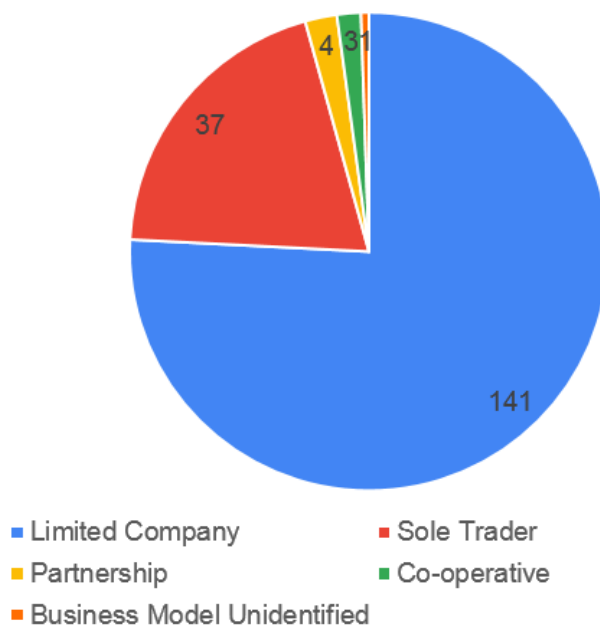
Company Size - Brittany



Business Models

The largest cohort of companies in the group, 141 in total (76%), were identified as Limited Companies. Sole Trader was identified as the business model for 37 companies (20%). Four companies were identified as Partnerships and three were identified as Co-operatives. A Business Model was not identified for the remaining one company in the group.

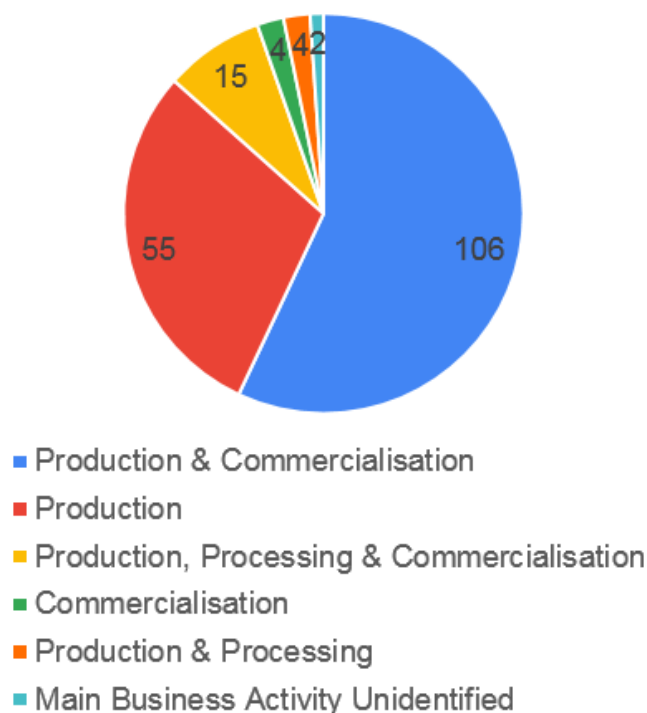
Business Models - Brittany



Main Business Activity

Production and Commercialisation was identified as the main business activity for 106 companies in the group (57%). Production was identified as the main business activity for 55 companies in the group (30%). Production, Processing & Commercialisation was identified as the main business activity for 15 companies in the group. Production & Process was identified as the main business activity for a further four companies. No main business activity was identified for the remaining two companies in the group.

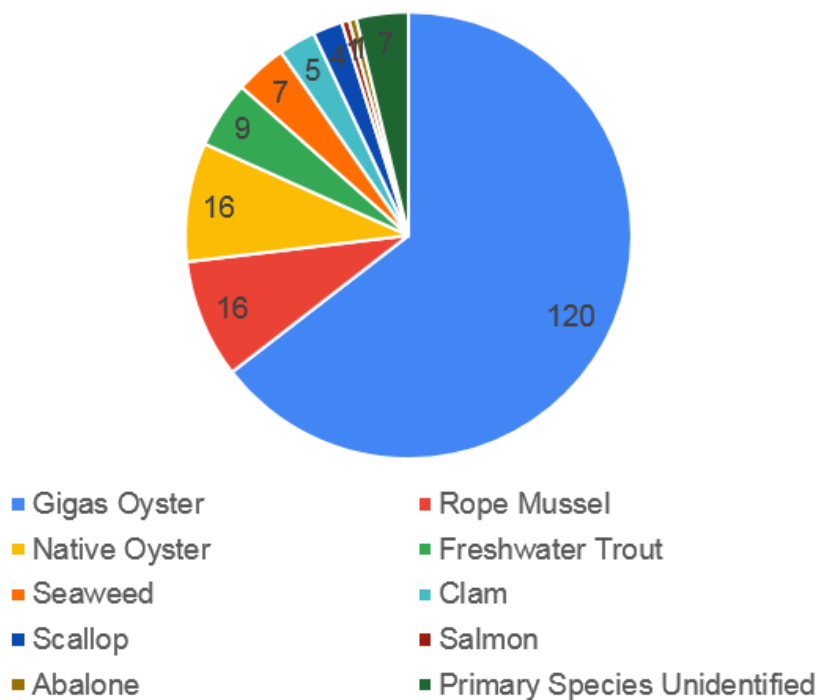
Main Business Activity - Brittany



Primary Species

Gigas Oyster was identified as the primary species for 120 companies in the group (65%). This was the largest number of companies in the group to identify the same species as their primary species. Rope Mussel was identified as the primary species for sixteen companies in the group. Native Oyster was identified as the primary species for a further sixteen companies in the group. Freshwater Trout was identified as the primary species for nine companies in the group. Seaweed was identified as the primary species for seven companies in the group. Clam was identified as the primary species for five companies in the group. Scallop was identified as the primary species for four companies in the group. Abalone was identified as the primary species for one company in the group. Salmon was identified as the primary species for a further one company in the group. No main species was identified for the remaining seven companies.

Primary Species - Brittany





Lead Partner



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