

Aquaculture in the U.S.

Overcoming Sustainability and Regulatory Challenges
In the Domestic Aquaculture Industry

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Oregon Consulting Group

Exceptional value for clients, transformative experiences for students

Industry Overview

What is Aquaculture?

“...The farming of aquatic organisms including fish, mollusks, crustaceans and aquatic plants.”
- FAO (2021)

Background



Wild Stocks Overfished



30-Yr Commercialization



\$250 Billion Industry

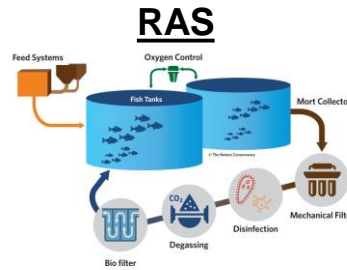


> 50% of Consumed Seafood

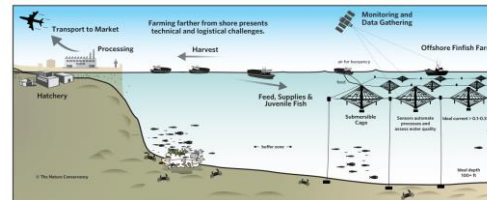


Traditional = Unsustainable

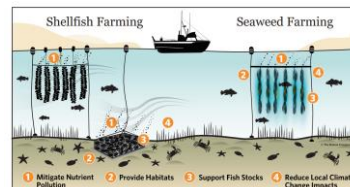
Systems



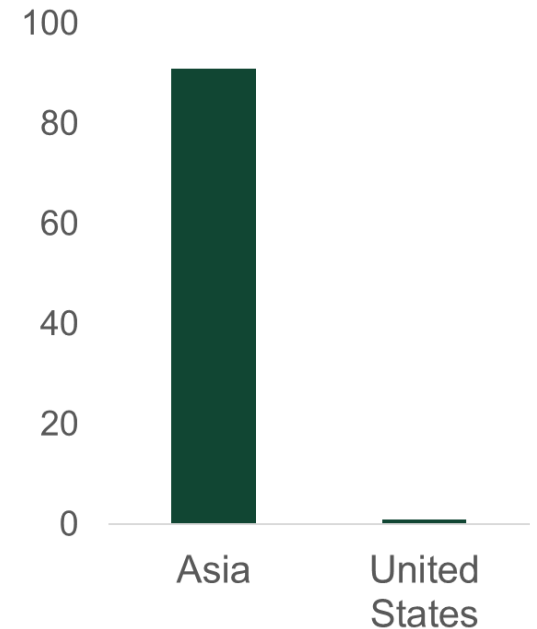
OFF-SHORE



BI-VALVE & SEAWEED



Status



■ Percent of Global Production (2019)

https://www.nature.org/content/dam/nc/nature/en/documents/TNC_EncourageCapital_TowardsABlueRevolution_v1_1.pdf

Structural Biases

Fragmented Governance

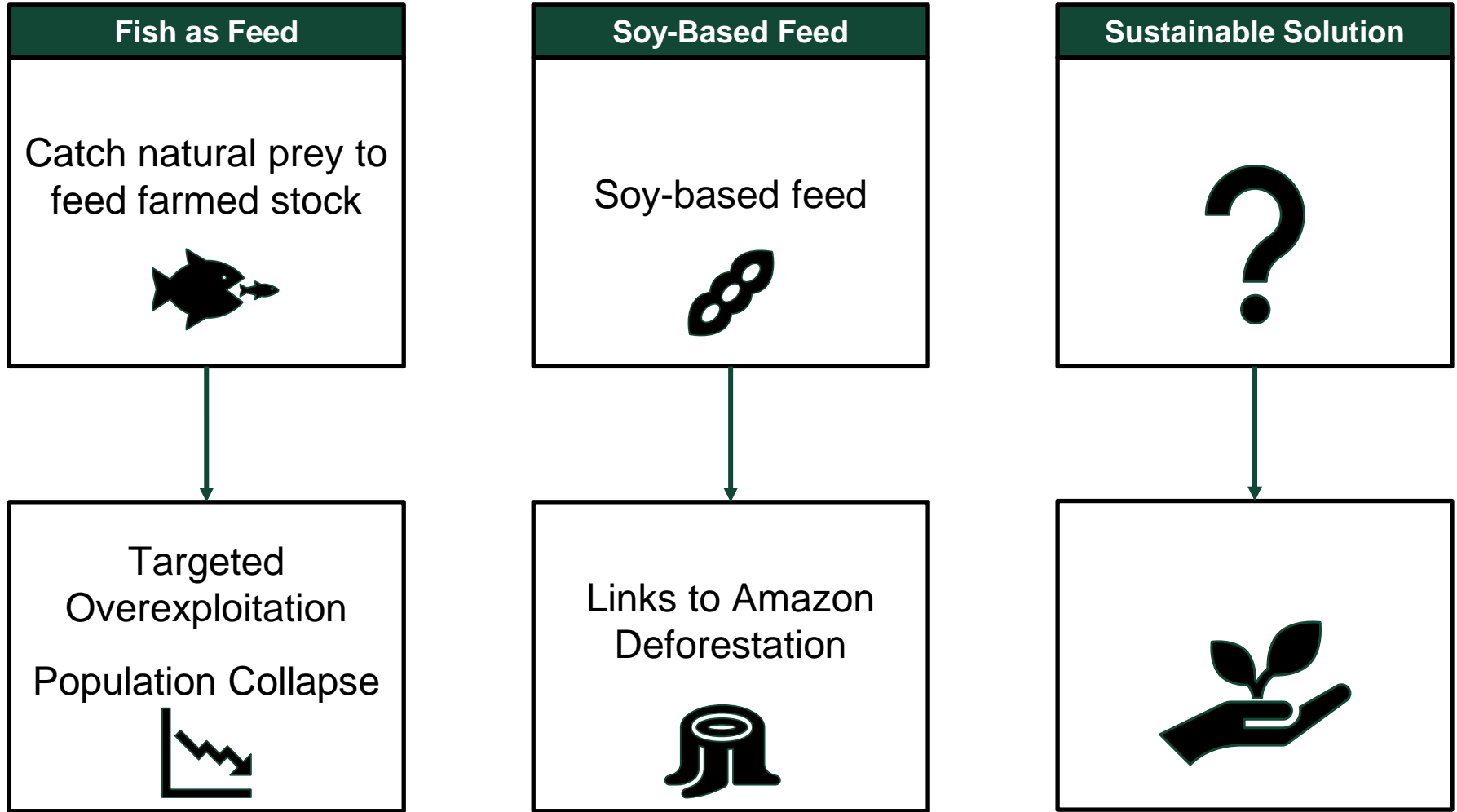
- ▶ There is no single jurisdiction or branch of government with total leasing or regulatory authority.

Anti-Aquaculture Pressure

- ▶ Coalitions of commercial fishermen and NGOs have systematically spearheaded opposition to aquaculture development.



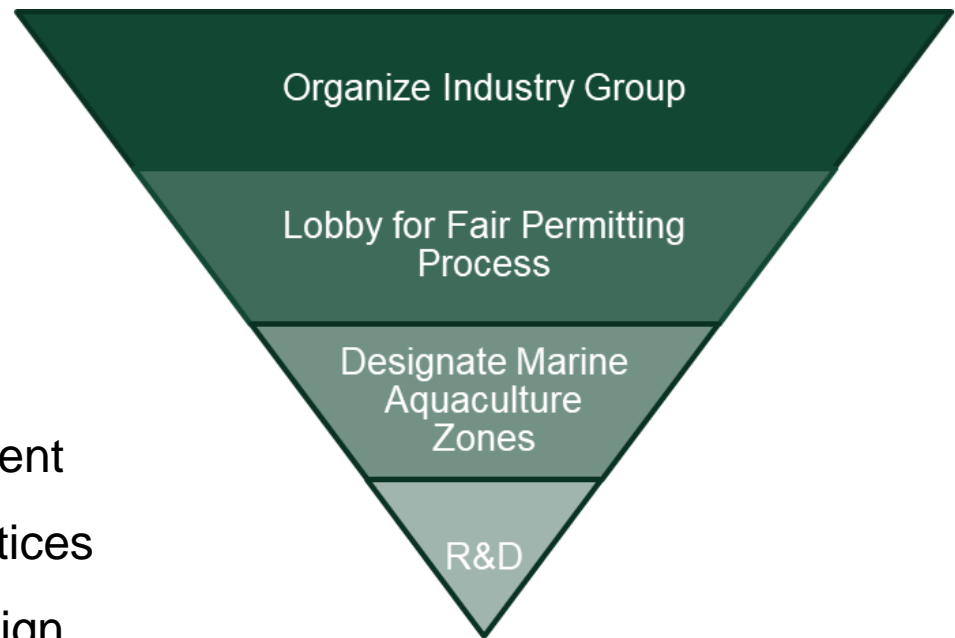
Feeding Unsustainable Growth



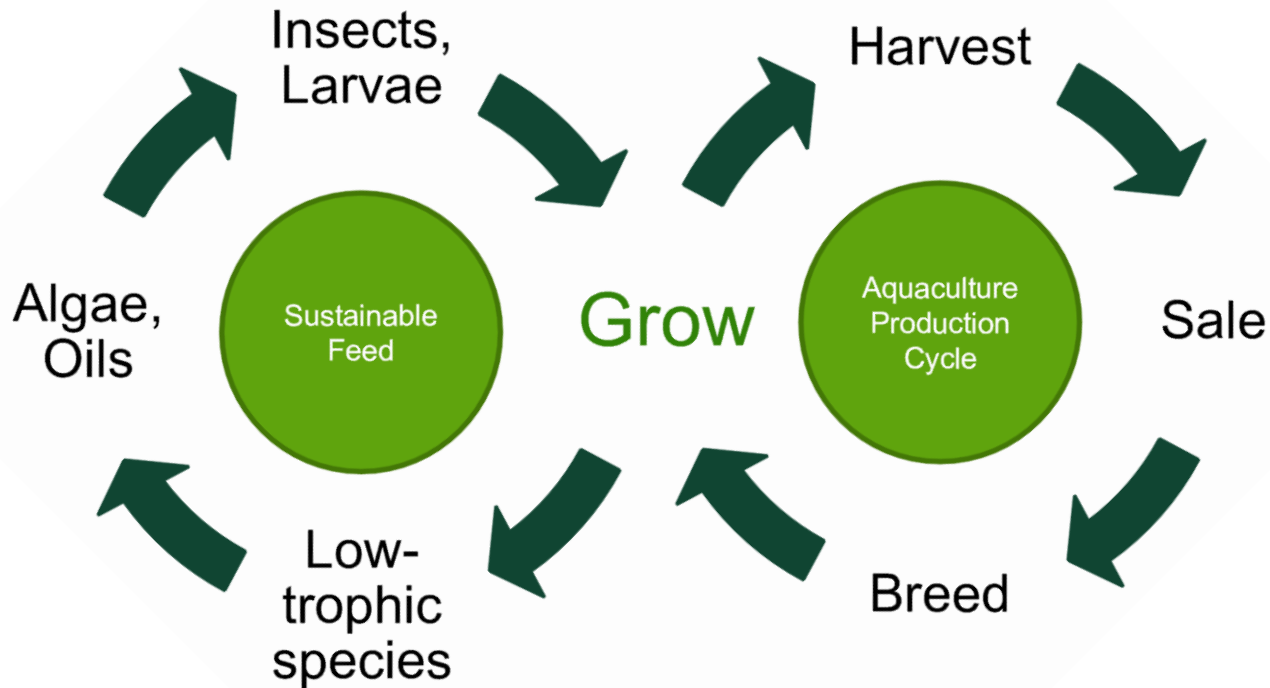
Recommendation – Organized Political Action

The fragmented US aquaculture industry must form a coalition to push for:

- ▶ Single Regulatory Authority
- ▶ Fair Representation
- ▶ Equal Influence
- ▶ Efficient Permitting Process
- ▶ Operational Zoning
- ▶ Funding for Industry Development
- ▶ Research Grants for Best Practices
- ▶ Pro-Industry Sentiment Campaign



Recommendation - Sustainable Feed Alternatives



Viability

- ▶ Low Environmental Impact (Short and Long Term)
- ▶ Minimal Land and Water Requirements
- ▶ Fast Replenishment Cycle
- ▶ High-Density Protein
- ▶ No Harm to Fish or Consumer Health