A global assessment of offshore mariculture potential from a spatial perspective
This publication was produced in recognition that there is a growing need to increasingly transfer land-based/coastal aquaculture production systems further offshore as a result of the expected increases in human population, competition for access to land and clean water needed to increase the availability of fish and fishery products much needed for human consumption. Mariculture, in particular offshore, offers significant opportunities for sustainable food production and development of many coastal communities, especially in regions where the availability of land, near shore space and freshwater are limited. This publication provides, for the first time, measures of the status and potential for offshore mariculture development from a spatial perspective that are comprehensive of all maritime nations and comparable among them. It also identifies nations that are not yet practicing mariculture that have a high offshore potential. The underlying purpose of this document is to stimulate interest for detailed assessments of offshore mariculture potential at national levels.

Remote sensing for the sustainable development of offshore mariculture is included as Annex 3 to this publication in recognition of the importance of remote sensing as a source of data for spatial analyses to assess potential for offshore mariculture, and also for zoning and site selection as well as for operational remote sensing to aid mariculture management.

Cover illustrations:
Map: Areas (dark blue) within Exclusive Economic Zones with temperatures favourable for offshore grow-out of cobia, Rachycentron canadum.
Photo: Cobia in submerged Aquapod net pens at the former site of Snapperfarm, Puerto Rico (courtesy of Ocean Farm Technologies Inc.).
A global assessment of offshore mariculture potential from a spatial perspective

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There is growing need to transfer land-based and/or coastal aquaculture production systems further into the sea as a result of the expected increases in human population, competition for access to land, and clean water needed to increase the availability of fish and fishery products for human consumption. Mariculture, in particular offshore aquaculture, offers significant opportunities for sustainable food production and for the development of many coastal communities, especially in regions where the availability of land, nearshore space and freshwater are limited.

This technical paper is an expanded and more detailed version of a contribution entitled “Spatial analysis of the potential for offshore mariculture” to a Food and Agriculture Organization of the United Nations (FAO) workshop proceedings (Lovatelli, Aguilar-Manjarrez and Soto, forthcoming) that aims at providing additional guidance in the development of offshore mariculture. The workshop proceedings collect and synthesize global information on the potential for offshore mariculture development by focusing on technical, environmental, spatial and governance challenges. The goal is also to identify major opportunities and challenges that FAO, its Member States and other stakeholders could act upon for the industry to grow on a sustainable footing.

This technical paper responds to the needs of the FAO Member States in providing estimates of the potential for offshore mariculture development, presenting, for the first time, quantitative spatial measures of the status and potential of offshore mariculture development that are comprehensive of all maritime nations and comparable among them.

This document is part of a recent series of spatially oriented activities aimed at the development and management of aquaculture. These activities have included reviews on geographic information systems, remote sensing and mapping for marine aquaculture, and spatial planning tools to support the ecosystem approach to aquaculture. Additionally, the activities also cover marine spatial planning for aquaculture, site selection and carrying capacity, and virtual technology and decision-support tools. Although these activities have had varying objectives, the common theme among them is the demonstration of the essential role of spatial analysis in the development and management of aquaculture from global to local levels. The present document continues this theme.
Abstract

Mariculture accounts for about one-half of total aquaculture production by weight. About one-half of the mariculture production consists of aquatic plants, with the remainder being fish and invertebrates. Nearly all of mariculture is inshore. In contrast, offshore mariculture, which is practised in the open sea with significant exposure to wind and wave action and with equipment and servicing vessels operating in severe sea conditions from time to time, is in its infancy and production is almost exclusively of fish and shellfish. There is an impetus for mariculture to move to the unprotected waters of the open sea. Issues at the local level include competition for space, water quality problems, and a negative public perception of mariculture’s environmental and aesthetic impacts. At the global level, there is concern for food security with expanding population along with the conviction that the potential of the world’s oceans to supplement the food supply is vastly underutilized. Prospecting for suitable locations is a critical part of spatial planning for offshore mariculture’s near-future development. Thus, the objectives of this technical paper are to provide measures of the status and potential for offshore mariculture development from a spatial perspective that are comprehensive of all maritime nations and comparable among them, to identify nations not yet practising mariculture that have a high offshore potential for it, and to stimulate interest in detailed assessments of offshore mariculture potential at national levels.

Estimates of offshore mariculture potential are based on key assumptions about its near-future development: offshore mariculture will develop within exclusive economic zones (EEZs), will mainly use culture systems modified from inshore mariculture, and will mainly employ species with already proven culture technologies and established markets. These assumptions set the stage for the identification of analytical criteria. Thus, EEZs were used as spatial frameworks to define the limits of national offshore mariculture development. Potential was defined by the depth and current speed limits on offshore cages and longlines, the cost-effective area for offshore mariculture development, and the favourable conditions for grow-out of representative species: cobia (Rachycentron canadum), Atlantic salmon (Salmo salar) and blue mussel (Mytilus edulis), and integrated multitrophic aquaculture (IMTA) of the last two species. Verification and comparison with existing mariculture showed that, despite the limitations of the data, the results are indicative of offshore mariculture potential within the specified criteria.

Offshore mariculture potential is large. At present, 44 percent of maritime nations with 0.3 million kilometres of coastline are not yet practising mariculture. About half of the mariculture nations have outputs of less than 1 tonne/kilometre of coastline. About one-half of inshore mariculture production consists of aquatic plants, but there is little production of plants offshore. Scenarios using 5 and 1 percent of the area meeting all of the criteria for each of the three species showed that development of relatively small offshore areas could substantially increase overall mariculture production. Improvements in culture technologies allowing for greater depths and increased autonomies, as well as the further development of free-floating or propelled offshore installations, would add greatly to the area with potential for offshore mariculture development.

Remote sensing for the sustainable development of offshore mariculture is included as Annex 3 to this publication in recognition of the importance of remote sensing as a source of data for spatial analyses to assess potential for offshore mariculture, and also for zoning and site selection as well as for operational remote sensing to aid mariculture management.

Contents

Preparation of this document iii
Abstract iv
List of tables vii
List of figures viii
List of plates x
List of boxes xi
Acknowledgements xii
Abbreviations and acronyms xiii
Executive summary xiv

1. Introduction 1
1.1 Background and objectives 1
1.2 Overview of the analytical approach and outputs 3
1.2.1 Key assumptions on the spatial development of offshore mariculture 4
1.2.2 Criteria and thresholds used to estimate near-future offshore mariculture potential 4
1.2.3 Comparisons of predicted offshore potential with inshore mariculture practice and verifications at offshore mariculture sites 11
1.2.4 Basic requirements and constraints on the study 12

2. Status of mariculture from a spatial perspective 13
2.1 Nominal intensity of the use of the coastline for mariculture at the national level 13

3. Exclusive economic zones as spatial frameworks for offshore mariculture development 17

4. Potential for offshore mariculture development 19
4.1 Overview 19
4.2 Areas where it is technically feasible to place culture installations 19
4.2.1 Areas within a cost-effective distance for offshore mariculture development and with access to ports 23
4.2.2 Spatial integration of technical feasibility for cages and longlines with cost-effective area for development 24
4.2.3 Summary of technical feasibility for cages and longlines and the cost-effective area for development 26
4.3 Areas favouring grow-out of fish and mussels spatially integrated with areas technically feasible for cages and longlines 27
4.3.1 Areas favouring grow-out of fish and mussels 28
4.3.2 Spatial integration of areas with favourable grow-out of fish and mussels with areas technically feasible for cages and longlines and within the cost-effective area for development 33
4.4 Hypothetical loss of offshore mariculture potential due to competing and conflicting uses 38
4.5 Summary of the results on offshore mariculture potential with species, culture systems and cost-effective area for development integrated 41

5. Comparisons and verifications for offshore mariculture potential 43
5.1 Cobia 43
5.1.1 National-level potential and production comparison 43
5.1.2 National to local level offshore mariculture potential compared with inshore mariculture locations 44
5.1.3 Offshore mariculture potential compared with actual offshore mariculture locations 46
5.2 Atlantic salmon 49
5.2.1 National-level potential and production comparison 49
5.2.2 National to local level offshore mariculture potential compared with inshore mariculture locations 50
5.3 Blue mussel 53
5.3.1 National-level potential and production comparison 53
5.3.2 National to local level offshore mariculture potential compared with inshore mariculture locations 55
5.4 IMTA offshore mariculture potential compared with inshore Atlantic salmon and mussel farm locations 55
5.5 Summary of comparisons of offshore mariculture potential of cobia, Atlantic salmon, blue mussel and IMTA with inshore mariculture of these species 55

6. Discussion and conclusions 59
6.1 Analytical approach 59
6.2 Comparisons of offshore mariculture potential with inshore mariculture practice and verification 60
6.3 Improvements in the approach 61
6.4 Offshore mariculture potential 63
6.5 Future directions 69
6.6 Recommendations 70

References 73

Annexes 85
1 Overview of the spatial analyses and data sources 85
2 Grid-based model: days of grow-out to a harvestable weight for Atlantic salmon among four salmon-producing countries 117
3 Remote sensing for the sustainable development of offshore mariculture 123
<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Criteria and corresponding threshold ranges used to estimate near-future offshore mariculture potential</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Status of mariculture from a spatial perspective</td>
<td>13</td>
</tr>
<tr>
<td>3</td>
<td>Number of nations and corresponding areas meeting depth, current speed and cost-effective area criteria for offshore mariculture development</td>
<td>20</td>
</tr>
<tr>
<td>4</td>
<td>Nations consistently scoring high in potential for offshore mariculture development in technical and cost-effective area for development as measured by ranks and overall scores</td>
<td>26</td>
</tr>
<tr>
<td>5</td>
<td>Number of nations and corresponding areas with potential for favourable growth for cobia, Atlantic salmon and blue mussel integrated with suitable depth and current speed for cages and longlines</td>
<td>28</td>
</tr>
<tr>
<td>6</td>
<td>Number of nations and corresponding areas within the cost-effective area for development integrated with favourable grow-out for cobia, Atlantic salmon, blue mussel and IMTA and depths and current speeds suitable for sea cages and longlines</td>
<td>33</td>
</tr>
<tr>
<td>7</td>
<td>Estimates of mariculture potential for cobia by regions and subregions</td>
<td>36</td>
</tr>
<tr>
<td>8</td>
<td>Number of nations and corresponding MPA area, and nations and corresponding areas within MPAs with potential for cobia offshore mariculture</td>
<td>38</td>
</tr>
<tr>
<td>9</td>
<td>National-level potential and production comparison for cobia: mean annual production (2004–2008) of cobia-producing nations with areas meeting temperature, depth and current speed criteria and areas meeting the first two criteria</td>
<td>43</td>
</tr>
<tr>
<td>10</td>
<td>Comparison of offshore potential of cobia with inshore cage sites and farming areas based on meeting the 22–32 °C temperature threshold</td>
<td>45</td>
</tr>
<tr>
<td>11</td>
<td>Cobia mariculture locations that are offshore</td>
<td>46</td>
</tr>
<tr>
<td>12</td>
<td>National-level comparison of Atlantic salmon annual production with potential by nation tabulated as areas meeting two temperature threshold ranges as well as depth and current speed criteria, and areas meeting the first two criteria</td>
<td>49</td>
</tr>
<tr>
<td>13</td>
<td>Blue mussel annual production by nation compared with offshore potential with areas meeting two temperature and two chlorophyll-a threshold ranges, as well as depth and current speed criteria, and areas meeting the first two criteria</td>
<td>54</td>
</tr>
<tr>
<td>14</td>
<td>Mean SWH ranges in 2009 in areas suitable for offshore mariculture of Atlantic salmon and cobia</td>
<td>62</td>
</tr>
<tr>
<td>15</td>
<td>Extrapolated annual production from the aggregate areas suitable for the offshore mariculture of cobia, Atlantic salmon and blue mussel with 5 percent and 1 percent of the areas developed for offshore mariculture</td>
<td>67</td>
</tr>
</tbody>
</table>
## Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sea cages and longlines for offshore mariculture</td>
<td>6</td>
</tr>
<tr>
<td>2</td>
<td>Effects of current speed on culture structures and on cultured organisms</td>
<td>6</td>
</tr>
<tr>
<td>3</td>
<td>Integrated multi-trophic aquaculture in practice and in concept</td>
<td>10</td>
</tr>
<tr>
<td>4</td>
<td>Intensity of mariculture production (2004–2008) in tonnes per kilometre of coastline and numbers of countries in the range</td>
<td>14</td>
</tr>
<tr>
<td>5</td>
<td>Ranking by area of main nations in intensity of mariculture (tonnes/km coastline) production (2004–2008)</td>
<td>14</td>
</tr>
<tr>
<td>6</td>
<td>Economic zones as spatial frameworks for offshore mariculture development</td>
<td>17</td>
</tr>
<tr>
<td>7</td>
<td>Ranking by area of main mariculture nations in area of economic zones</td>
<td>18</td>
</tr>
<tr>
<td>8</td>
<td>Ranking by area of main non-mariculture nations in area of economic zones</td>
<td>18</td>
</tr>
<tr>
<td>9</td>
<td>Areas with depths suitable for sea cages and longlines within economic zones</td>
<td>19</td>
</tr>
<tr>
<td>10</td>
<td>Ranking by area of main mariculture nations in depths suitable for sea cages and longlines</td>
<td>20</td>
</tr>
<tr>
<td>11</td>
<td>Ranking by area of main non-mariculture nations in depths suitable for sea cages and longlines</td>
<td>20</td>
</tr>
<tr>
<td>12</td>
<td>Areas within EEZs with current speeds suitable for sea cages and longlines</td>
<td>21</td>
</tr>
<tr>
<td>13</td>
<td>Ranking by area of main mariculture nations with current speeds suitable for sea cages and longlines</td>
<td>21</td>
</tr>
<tr>
<td>14</td>
<td>Ranking by area of main non-mariculture nations with current speeds suitable for sea cages and longlines</td>
<td>21</td>
</tr>
<tr>
<td>15</td>
<td>Areas in northern Latin America with current speeds and depths suitable for sea cages and longlines</td>
<td>22</td>
</tr>
<tr>
<td>16</td>
<td>Ranking by area of main mariculture nations with current speeds and depths suitable for sea cages and longlines</td>
<td>22</td>
</tr>
<tr>
<td>17</td>
<td>Ranking by area of main non-mariculture nations with current speeds and depths suitable for sea cages and longlines</td>
<td>22</td>
</tr>
<tr>
<td>18</td>
<td>Cost-effective area for offshore mariculture development that is within 25 nm of a port</td>
<td>23</td>
</tr>
<tr>
<td>19</td>
<td>Ranking by area of main mariculture nations in cost-effective area for development</td>
<td>24</td>
</tr>
<tr>
<td>20</td>
<td>Ranking by area of main non-mariculture nations in cost-effective area for development</td>
<td>24</td>
</tr>
<tr>
<td>21</td>
<td>Ranking by area of main mariculture nations with current speeds and depths suitable for sea cages and longlines and within the cost effective area for development</td>
<td>25</td>
</tr>
<tr>
<td>22</td>
<td>Ranking by area of main non-mariculture nations with current speeds and depths suitable for sea cages and longlines and within the cost-effective area for development</td>
<td>25</td>
</tr>
<tr>
<td>23</td>
<td>Offshore mariculture potential for sea cages and longlines by areas meeting depth, current speed and cost-effective area for development criteria</td>
<td>27</td>
</tr>
</tbody>
</table>
Offshore mariculture potential for sea cages and longlines by numbers of nations meeting depth, current speed and cost-effective area for development criteria

Areas within EEZs with temperatures favourable for offshore grow-out of cobia

Regional view of areas in South Asia-Oceania with temperatures favourable for offshore grow-out of cobia and depths and current speeds suitable for sea cages

Ranking by area of main mariculture nations with temperatures favourable for cobia grow-out and current speeds and depths suitable for sea cages

Ranking by area of main non-mariculture nations with temperatures favourable for cobia grow-out and current speeds and depths suitable for sea cages

Areas within EEZs with temperatures favourable for offshore grow-out of Atlantic salmon

Ranking by area of main mariculture nations with temperatures favourable for Atlantic salmon grow-out and current speeds and depths suitable for sea cages

Areas within EEZs with temperatures and chlorophyll-a concentrations favourable for offshore grow-out of the blue mussel

Ranking by area of main mariculture nations with temperatures and chlorophyll-a concentrations favourable for blue mussel growth-out and depths and current speeds suitable for longlines

Regional view of areas in southern Latin America with temperatures and chlorophyll-a concentrations favourable for Atlantic salmon-blue mussel IMTA and depths and current speeds suitable for sea cages and longlines

Ranking by area of main mariculture nations with temperatures and chlorophyll-a concentrations favourable for Atlantic salmon-blue mussel IMTA and current speeds and depths suitable for sea cages and longlines

Ranking by area of main mariculture nations in cost-effective area for development, temperatures favourable for offshore grow-out of cobia and current speeds and depths suitable for sea cages

Ranking by area of main mariculture nations in cost-effective area for development, temperatures favourable for offshore grow-out of cobia and current speeds and depths suitable for sea cages

Ranking by area of main non-mariculture nations in cost-effective area for development, temperatures favourable for offshore grow-out of cobia and current speeds and depths suitable for sea cages

Ranking by area of main non-mariculture nations in cost-effective area for development, temperatures favourable for offshore grow-out of cobia and current speeds and depths suitable for sea cages

Ranking by area of main mariculture nations within the cost-effective area for development, with temperatures favourable for Atlantic salmon grow-out and current speeds and depths suitable for sea cages

Ranking by area of main mariculture nations within the cost-effective area for development, with temperature and chlorophyll-a concentration favourable for blue mussel grow-out and current speeds and depths suitable for longlines
39  Ranking by area of main mariculture nations within the cost-effective area for development, with temperatures and chlorophyll-a concentration favourable for Atlantic salmon-blue mussel IMTA and current speeds and depths suitable for sea cages and longlines

37  

39  Ranking by area of main mariculture nations in marine protected areas

39  

40  Ranking by area of main non-mariculture nations in marine protected areas

39  

41  Regional view of area within MPAs with temperatures favourable for cobia grow-out and depths and current speeds suitable for sea cages

40  

42  Ranking by area of main mariculture nations in hypothetical loss of area with potential for offshore mariculture of cobia due to exclusion from MPAs

40  

43  Ranking by area of main non-mariculture nations with a hypothetical loss of area with potential for offshore mariculture of cobia due to exclusion from MPAs

41  

44  Area suitable for the offshore mariculture of cobia, Atlantic salmon, blue mussel and IMTA among maritime nations overall and within the cost-effective area for development

41  

45  Numbers of maritime nations with areas suitable for the offshore mariculture of cobia, Atlantic salmon, blue mussel and IMTA overall and within the cost-effective area for development

42  

47a  Cobia cages in site 1 near Belize City, Belize

47  

47b  Cobia cages in site 2 near Belize City, Belize

47  

47c,d,e,f Areas with temperatures favourable for grow-out of cobia and depths and current speeds suitable for sea cages compared with locations of cobia sea cage sites

48  

48  Areas with temperatures favourable for grow-out of Atlantic salmon and depths and current speeds suitable for sea cages compared with locations of salmon farms in Norway, Ireland, Canada and Chile

52  

49  Areas with temperatures and chlorophyll-a favourable for blue mussel grow-out and depths and current speeds suitable for longlines compared with locations of mussel farms in Norway and Ireland

56  

50  Areas (km²) within EEZs relative to depths and current speeds suitable for sea cages and longlines and to the cost-effective area for development

64  

51  Idealized diagram of a multiple sea cage system with a single point mooring

65  

52  An Ocean Drifter cage concept

65  

53  Conceptual design of a 400-ha ocean food and energy farm unit

66  

54  Offshore wind farm combined with oyster and mussel farming

68
Plates

1  Fish cages in rough weather in Norway  7
2  Species indicative of different kinds  
of offshore mariculture potential  8
3  Example of fed aquaculture of fish in cages  9
4  Net cages along the coast of Turkey  15
5  Net cages along the coast of Norway  15
6  Experimental version of an offshore towed fish cage  65

Boxes

1  Definition of offshore aquaculture  1
2  Key assumptions about the near-future development of offshore  
mariculture  4
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## Abbreviations and acronyms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHL-2</td>
<td>Chlorophyll-a concentration estimated by algorithms that deal with the effects of suspended solids and dissolved organic matter that occur in coastal waters cm/s centimetres per second</td>
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<tr>
<td>CCRF</td>
<td>FAO Code of Conduct for Responsible Fisheries</td>
</tr>
<tr>
<td>cs</td>
<td>current speed</td>
</tr>
<tr>
<td>EA</td>
<td>ecosystem approach</td>
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<tr>
<td>EAA</td>
<td>ecosystem approach to aquaculture</td>
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<tr>
<td>EEZ</td>
<td>exclusive economic zone</td>
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<tr>
<td>ESRI</td>
<td>Environmental Sciences Research Institute</td>
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<tr>
<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
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<tr>
<td>FCR</td>
<td>food conversion ratio</td>
</tr>
<tr>
<td>GADM</td>
<td>Database of Global Administrative Areas</td>
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<tr>
<td>GEBCO</td>
<td>General Bathymetric Chart of the Ocean</td>
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<tr>
<td>GIS</td>
<td>geographic information systems</td>
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<tr>
<td>GISFish</td>
<td>Global Gateway to Geographic Information Systems, Remote Sensing and Mapping for Fisheries and Aquaculture</td>
</tr>
<tr>
<td>GMFMC</td>
<td>Gulf of Mexico Fishery Management Council</td>
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<tr>
<td>HYCOM</td>
<td>HYbrid Coordinate Ocean Model</td>
</tr>
<tr>
<td>IMTA</td>
<td>integrated multitrophic aquaculture</td>
</tr>
<tr>
<td>ITCZ</td>
<td>Intertropical Convergence Zone</td>
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<tr>
<td>IUCN</td>
<td>International Union for Conservation of Nature</td>
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<tr>
<td>nm</td>
<td>nautical mile</td>
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<tr>
<td>OECD</td>
<td>Organisation for Economic Co-operation and Development</td>
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<tr>
<td>OHI</td>
<td>Ocean Health Index</td>
</tr>
<tr>
<td>MPA</td>
<td>marine protected areas</td>
</tr>
<tr>
<td>NMFS</td>
<td>National Marine Fisheries Service</td>
</tr>
<tr>
<td>SST</td>
<td>sea surface temperature</td>
</tr>
<tr>
<td>SWH</td>
<td>significant wave height</td>
</tr>
<tr>
<td>UNEP</td>
<td>United Nations Environment Programme</td>
</tr>
<tr>
<td>TGC</td>
<td>thermal growth coefficient</td>
</tr>
<tr>
<td>VBA</td>
<td>Visual Basic for Applications</td>
</tr>
<tr>
<td>VLIZ</td>
<td>Flanders Marine Institute</td>
</tr>
<tr>
<td>WCMC</td>
<td>World Conservation Monitoring Centre</td>
</tr>
</tbody>
</table>
Executive summary

**Why mariculture needs to move offshore**

Mariculture, with a production of 36.1 million tonnes and a value of US$37.9 billion in 2010 (FAO Statistics and Information Branch of the Fisheries and Aquaculture Department, 2012), accounts for about one-half of total aquaculture production by weight. About one-half of the mariculture production consists of aquatic plants, with the remainder being fish and invertebrates. Nearly all of mariculture is inshore mariculture, that is mariculture that is situated or carried out near the shore. In contrast, offshore mariculture practice is in its infancy and production is almost exclusively of fish and shellfish. Drivers at local and global levels provide impetus for mariculture to move to the unprotected waters of the open sea. At the local level, there are issues of competition for space both within the mariculture sector and with other users, problems with water quality, and oftentimes there is a negative public perception of mariculture’s environmental and aesthetic impacts. At the global level, there is concern for maintaining food security with expanding population. Also, there is the conviction that the potential of the world’s oceans to supplement the food supply is vastly underutilized. This situation places a premium on spatial planning for offshore mariculture. Prospecting for suitable locations for offshore mariculture’s near-future development is a critical part of a future-focused approach that will take advantage of opportunities for increasing production while minimizing the issues associated with inshore mariculture.

**A framework for offshore mariculture development**

Recognizing the need to stimulate the development of offshore aquaculture, the FAO Fisheries and Aquaculture Department conducted a workshop on offshore mariculture (Lovatelli, Aguilar-Manjarrez and Soto, forthcoming). The workshop recognized that FAO can guide and support its Member States and the industry as a whole in the policy and technical developments needed for expanding mariculture to offshore areas. As part of this framework, spatially derived estimates are essential to define locations and quantify expanses of areas suitable for offshore mariculture development. Furthermore, many of the issues and opportunities associated with the development of offshore mariculture have components that can be addressed separately, or together, using spatial analyses. In particular, spatial analysis lends itself to the integration of technical, economic, environmental and jurisdictional problems of mariculture development, all of which are included in this study.

**Objectives of this technical paper**

The main objective of this technical paper is to provide measures of the status and potential for offshore mariculture development from a spatial perspective that are comprehensive of all maritime nations and comparable among them. The results are a spatial gauge of the indicative near-future global and national potential for the expansion of mariculture from the present inshore locations to offshore areas. The results are also aimed at stimulating much more comprehensive and detailed assessments of offshore mariculture potential at national levels. A final objective is to identify nations that have a high offshore mariculture potential but that are not yet practising it.1 With these objectives in mind, the study is aimed at decision-makers of

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1 Mariculture countries for the purposes of this study are those listed in the FAO aquaculture production statistics (FAO Statistics and Information Branch of the Fisheries and Aquaculture Department, 2010) as having mariculture production originating from the marine environment in one or more years for the period 2004–2008.
international organizations and at all levels of governmental administrations involved with aquaculture development as well as at entities in the commercial sector involved with mariculture services and development.

How offshore mariculture potential was estimated and verified
The process began with key assumptions about the near-future development of offshore mariculture. Among the key assumptions are that offshore mariculture will develop within the exclusive economic zones (EEZs), will mainly use cages for fish and longlines for molluscs modified for offshore conditions, and will mainly employ species with already proven mariculture technologies and established markets. These assumptions set the stage for the establishment of analytical criteria and thresholds that are at the core of the spatial analyses. The analytical criteria and corresponding thresholds that define the technical limits on cages and longlines are depths (25–100 m) and current speeds (10–100 cm/s). Likewise, the criteria that define the cost-effective area for development of offshore mariculture are cost limits on travel time and distance from shore to offshore installations (25 nm, or 46.3 km), and reliable access to a port. Species indicative of various kinds of mariculture potential and that meet the culture system technology and market requirement criteria are cobia, Atlantic salmon and blue mussel. Favourable grow-out of fish and mussels is defined by water temperature (22–32 °C for cobia, 1.5–16 °C for Atlantic salmon, and 2.5–19 °C for blue mussel). In the case of the blue mussel, favourable grow-out also is assessed by food availability measured as chlorophyll-a concentration (> 0.5 mg/m³). Potential for offshore integrated multitrophic aquaculture (IMTA) of the last two species also was analysed. Spatial analyses were carried out using a geographic information system (GIS). Offshore mariculture potential was reported as maps showing the areas with potential, tables that presented surface areas in aggregate globally, and charts with potential ranked by nations.

The results were verified by comparisons of national-level production of each of the three species with national-level offshore mariculture potential, locations of inshore mariculture with offshore potential at national and local levels, and offshore mariculture locations compared with offshore potential in the same areas. The verification and comparison exercises showed that, despite the limitations of the data, the results are sufficiently reliable for the objectives, namely to comprehensively and comparatively deliver locations and surface areas of offshore mariculture potential aggregated globally that are a first approximation of near-future offshore mariculture potential at the national level.

Near-future offshore mariculture potential
Estimates of near-future mariculture potential come from two perspectives. The first is the assessment of the present status of mariculture in spatial terms covering the period 2004-2008. The results of this assessment indicate that the global potential is large for both inshore and offshore mariculture in aggregate and for many nations individually for the following reasons: nearly all of present-day mariculture takes place in sheltered areas, not offshore. Interestingly, about 44 percent of maritime nations are not yet practising mariculture; about one-half of mariculture production consists of aquatic plants, but there is as yet little production of plants offshore. Mariculture intensity measured as production in terms of tonnes/kilometre of coastline reveals that there are 0.3 million km of coastline along which mariculture is not yet practised. Mariculture intensity is highest in the Northern Temperate Zone followed by the Intertropical Convergence Zone, the Arctic Zone and the Southern Temperate Zone. Among the 93 nations and territories already practicing mariculture, 51 percent produce at a relatively low intensity of less than 1 tonne/kilometre of coastline.
The second perspective is based on spatial integration of basic criteria for cage and longline culture systems (depth, current speed) with criteria for favourable grow-out of cultured animals (temperature, food availability as chlorophyll-a for the mussel).

- There are large areas globally among many nations with potential for development of offshore mariculture. Overall potential (i.e. without taking into account distance from shore) for cobia is 793 938 km², for Atlantic salmon 30 966 km², for blue mussel 29 960 km², and for IMTA 14 590 km². This approximates potential for other fish and mussel species with similar environmental requirements for grow-out in cages or on longlines.

- Even when further constrained by including the cost-effective area for development as an additional criterion, large areas with potential that include many nations remain. Offshore potential for Atlantic salmon (2 447 km²) and blue mussel (5 848 km²) is limited to the nations already practising their culture in inshore waters. Potential for IMTA of these species is 1 202 km². In contrast, offshore mariculture potential for cobia is 97 192 km² among 80 maritime nations, of which 34 are not yet practising mariculture. This indicates that there is greater offshore mariculture potential for species with warm temperate and tropical grow-out regimes than for those with cool and cold temperate grow-out regimes.

- Mariculture potential has been assumed with other uses of marine space set aside. However, marine protected areas have been used as an illustration of possible competing, conflicting or complementary uses. This is a reminder that, although the area with potential is large, that potential will be reduced considerably by alternative uses for the same marine space, especially in inshore areas where current marine activities are focused.

- A fundamental question is how much area is sufficient for offshore mariculture development that would contribute to the global food supply? Development scenarios using 5 and 1 percent of the area meeting all of the criteria for each of the three species indicated that development of relatively small offshore areas could substantially increase overall mariculture production.

- Improvements in technologies could considerably increase offshore mariculture potential. The area meeting depth, current speed and cost-effective area for development criteria is only 0.1 percent of the total EEZ area. For instance, an increase in the mooring system depth for cages and longlines from the 100 m limit used herein to 150 m would increase the suitable area by 31 percent, or 4.2 million km². Looking to a more distant future, free-floating and propelled offshore culture installations would potentially open immense areas to offshore farming that would still be within EEZs, nearly 158 million km² for a structure requiring a minimum depth of 25 m.

**Policy implications for offshore mariculture development**

Policy implications for offshore mariculture development are considered as those pertaining to FAO, and possibly to other international organizations providing technical assistance, and to maritime nations.

**Policy implications for FAO**

- A significant number of maritime nations are not yet practising mariculture, let alone offshore mariculture. This suggests the need for a proactive approach by FAO that would be a rapid appraisal (desk study) to determine the reasons for the lack of development and to make recommendations on steps that should be taken to stimulate mariculture development among the most promising nations. The results of the present study identify the non-mariculture nations ranking highly in offshore mariculture potential and provide one of the starting points for the appraisal.
Executive summary

• It will be important to monitor the growth of the offshore mariculture industry. For this purpose, FAO and Member countries will need to create a new aquaculture statistical category “offshore mariculture”. Underlying that is the need for a simple, spatially oriented but unambiguous, definition for offshore mariculture.

• Spatial planning for offshore mariculture should be considered as one of the components of marine spatial planning.

• FAO is in a position to provide strong worldwide leadership for more holistic development of offshore mariculture that must comprise the full range of components identified under the FAO Code of Conduct for Responsible Fisheries and the ecosystem approach to aquaculture (EAA).

• There is a continuing need to gauge capacities (human resources, infrastructure, finances) at the national and/or regional level to implement the use of appropriate modelling and spatial tools in support of offshore mariculture development so that capacity-building initiatives can be matched to existing capabilities.

• The investigation of aquaculture potential need not be confined to marine environments. A similar approach could be used to investigate and further plan for aquaculture in all environments for nations that have not already done so.

Policy implications for maritime nations

• Maritime nations not yet practising mariculture, particularly those for which this study signals relatively large potential, should consider a broad-based rapid appraisal of opportunities and impediments for mariculture development.

• Nations already practising mariculture should consider undertaking a thorough appraisal of their offshore mariculture potential that would be couched in the EAA. Ideally, the appraisal would be designed so that the results would also satisfy broader efforts for marine spatial planning.

• An important goal of spatial analysis is to locate and quantify the complementary uses while avoiding or minimizing the competing and conflicting uses. This study, in a very broad way, serves to indicate the spatial domains that could become offshore mariculture uses as a component in marine spatial planning at regional and national levels.